

Mackenzie Account No. \_\_\_\_\_

Subscriber's Last Name \_\_\_\_\_ First Name \_\_\_\_\_

Joint Subscriber's Last Name \_\_\_\_\_ First Name \_\_\_\_\_  
(if applicable)

**ADDRESS AND PERSONAL INFORMATION UPDATE**

<input type="checkbox"/> <b>Address Update</b> (check one only) <input type="radio"/> All (Subscribers & Beneficiaries) <input type="radio"/> Beneficiaries only <input type="radio"/> Subscribers only <input type="radio"/> Specific Beneficiary <input type="radio"/> Specific Subscriber      Name _____ Name _____	Enter new address here:   	
<input type="checkbox"/> <b>Personal Information Update</b> <input type="radio"/> Subscriber <input type="radio"/> Primary Caregiver (PCG) <input type="radio"/> Beneficiary – Name _____	<input type="radio"/> Name <input type="radio"/> Social Insurance Number <input type="radio"/> Date of Birth <input type="radio"/> Gender	Enter change here:   

**ACCOUNT INFORMATION UPDATE**

<input type="checkbox"/> <b>Grant Fund Change</b>	Fund Number: _____ Fund Name: _____													
<input type="checkbox"/> <b>Grant Validation Cancellation</b> Effective immediately, cease grant validation requests for the: <input type="radio"/> Beneficiary – Name _____ <input type="radio"/> All Beneficiaries	<input type="radio"/> Basic Canada Education Savings Grant (CESG) <input type="radio"/> Additional Canada Education Savings Grant (CESG) <input type="radio"/> Saskatchewan Advantage Grant for Education Savings (SAGES)	<input type="radio"/> Canada Learning Bond (CLB) <input type="radio"/> Quebec Education Savings Incentive (QESI) <input type="radio"/> British Columbia Training and Education Savings Grant (BCTESG)												
<input type="checkbox"/> <b>Contribution Allocation Standing Instructions</b> Effective immediately, allocate all future purchases based on this allocation	<table style="width:100%; border-collapse: collapse;"> <tr> <th style="width:70%;">Beneficiary</th> <th style="width:30%;">Percent Allocation (%)</th> </tr> <tr><td>_____</td><td>_____</td></tr> <tr><td>_____</td><td>_____</td></tr> <tr><td>_____</td><td>_____</td></tr> </table>	Beneficiary	Percent Allocation (%)	_____	_____	_____	_____	_____	_____					
Beneficiary	Percent Allocation (%)													
_____	_____													
_____	_____													
_____	_____													
<input type="checkbox"/> <b>Contribution Allocation Current Purchase</b> Trade Date _____ Purchase Amount \$ _____	<table style="width:100%; border-collapse: collapse;"> <tr> <th style="width:70%;">Beneficiary</th> <th style="width:30%;">Percent Allocation (%)</th> </tr> <tr><td>_____</td><td>_____</td></tr> <tr><td>_____</td><td>_____</td></tr> <tr><td>_____</td><td>_____</td></tr> </table>	Beneficiary	Percent Allocation (%)	_____	_____	_____	_____	_____	_____					
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_____	_____													
_____	_____													
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<input type="checkbox"/> <b>Contribution Reallocation</b> Contributions made within previous three years (based on trade date of purchases) Total Contributions \$ _____	<table style="width:100%; border-collapse: collapse;"> <tr> <th style="width:33%;">Current Beneficiary with Unassisted Contributions</th> <th style="width:33%;">Reallocate to New Beneficiary</th> <th style="width:33%;">Reallocation Amount (\$)</th> </tr> <tr><td>_____</td><td>_____</td><td>_____</td></tr> <tr><td>_____</td><td>_____</td><td>_____</td></tr> <tr><td>_____</td><td>_____</td><td>_____</td></tr> </table>	Current Beneficiary with Unassisted Contributions	Reallocate to New Beneficiary	Reallocation Amount (\$)	_____	_____	_____	_____	_____	_____	_____	_____	_____	
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_____	_____	_____												
_____	_____	_____												
_____	_____	_____												

**Advisor Name** \_\_\_\_\_ **Dealer Advisor Code** \_\_\_\_\_

**Advisor Signature**  **Date**   
Subscriber(s) signature not required