



## CONFIDENTIALITY AND PERSONAL INFORMATION PROTECTION

\* Only complete if the subscriber is not the primary caregiver and/or custodial parent/legal guardian of the beneficiary (or beneficiaries).

By completing the Annex B - *Primary Caregiver and/or Custodial Parent/Legal Guardian, of the Application for the Basic and Additional Canada Education Savings Grant (CESG) and Canada Learning Bond (CLB)*, you authorize the Kaleido Foundation and Kaleido Growth Inc. to:

- collect your personal information and that of the beneficiary, which is necessary to manage the education savings plan(s);
- contact the beneficiary at plan maturity to provide information on how to apply for educational assistance payments (EAPs);
- create a file for this purpose and record your personal information and that of the beneficiary therein. This file will be kept at the head office and electronically accessible to the RESP subscriber's assigned representative.
- give the subscriber's representative and employees of Kaleido Growth Inc. access to your file for consultation in the exercise to their functions, such as sending you targeted promotional offers, maximization strategies, product suggestions based on your profile, or to make changes to the file for the sound management of the RESP(s).

The Kaleido Foundation and Kaleido Growth Inc. cannot disclose the content of your file unless required to do so by law.

You can refer to our *Personal Information Protection Policy* on our website at [kaleido.ca](http://kaleido.ca) for more information about your access rights, rectification and how to revoke your consent.

subscriber's Name: \_\_\_\_\_ (Print clearly)

Beneficiary's Name: \_\_\_\_\_ (Print clearly))

Signature date:

\_\_\_\_\_

Primary caregiver and/or custodial parent/legal guardian

\_\_\_\_\_

Signature

This document must be duly signed and attached to *Annex B - Primary Caregiver and/or Custodial Parent/Legal Guardian of the Application for the Basic and Additionnal Canada Education Savings Grant (CESG) and Canada Learning Bond (CLB)*. Both documents must be returned to the representative or to Kaleido Growth Inc. at: 1035 Wilfrid-Pelletier Avenue, suite 500, Quebec (QC) G1W 0C5.