

RESP Planner

Prepared By:

Date:

1 Client Information

Client _____ Spouse/Partner _____
DOB _____ DOB _____

2 Assumptions

Frequency of Contributions: Annual Monthly

Investment Rate of Return _____ % Marginal Tax Rate _____ %

3 Beneficiary Information

First Name _____ Last Name _____
DOB _____ Relationship _____
Gender: Male Female Province of Residence _____

4 Education Expenses

Age to Start School _____ Years in School _____
Annual Tuition Costs \$ _____ Tuition Inflation Rate _____ %
Annual Room and Board \$ _____ Room and Board Inflation Rate _____ %

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5 Education Savings

Past RESP Contributions \$ _____

Past CESG Received \$ _____

Current Value of RESP \$ _____

Future RESP Contributions \$ _____

Current Value of Taxable Savings \$ _____

Contributions to Taxable Savings \$ _____

*Use multiple worksheets if additional beneficiaries exist.