Indian Residential Schools Settlement Agreement Personal Credits General Information

What are Personal Credits:

The Indian Residential School Settlement Agreement ("IRSSA") stipulates that once all Common Experience Payments have been made, if more than \$40 million remains in the trust, the funds are to be made available to CEP recipients who apply in the form of personal credits of up to \$3,000 each for educational purposes.

- CEP recipients will be able to choose to transfer their Personal Credits to certain family members as per the Indian Residential School Settlement Agreement;
- Terms and conditions for Personal Credits have been developed by Canada and the Assembly of First Nations and by Canada and Inuit Representatives to determine which programs and services and which educational institutions are eligible;
- Once the Personal Credits have been distributed, any amount remaining in the trust on January 1, 2015 is to be paid to the National Indian Brotherhood Trust Fund and the Inuvialuit Education Foundation to be used for educational programs.

It is currently estimated that the trust will be in excess of the \$40 million threshold required to trigger the implementation of Personal Credits for CEP Recipients to get an equal share of "Personal Credits," **not cash**, for a maximum value of \$3,000 to be used for personal or group education services.

Where can you use your Personal Credits:

Personal Credits may be used for either personal or group education services provided by Education Entities or Group Educational Services jointly approved by the Assembly of First Nations and Canada, as well as the Inuit Representatives and Canada.

First Nations, Métis and all other non-Inuk CEP Recipients may choose to pool their Personal Credits with other CEP Recipients and Transferees to develop and to participate in specific education programs. These Group Services would be aimed at the preservation, reclamation, development or understanding of native identities, histories, cultures or languages.

Inuit CEP Recipients may choose to pool their Personal Credits with other CEP Recipients and Transferees to participate in Group Educational Services including those aimed at the preservation, reclamation, development, or understanding of Inuit identities, histories, cultures, or languages. If you wish to participate in group Inuit cultural and language programs and if you want the assistance of your Inuit Land Claim Organization, please contact your Inuit Land Claim Organization. Inuit Land Claim Organization means Inuvialuit Regional Corporation, Makivik Corporation, or Nunavut Tunngavik Inc.

Educational programs or services include, but are not limited to those provided by universities, colleges, trade or training schools, or which relate to literacy or trades, as well as programs or services which relate to the preservation, reclamation, development or understanding of native history, cultures, or languages. More information, including the list of approved Education Entities and Group Educational Services can be found on the Official Court website at www.residentialschoolsettlement.ca or by calling the Personal Credits toll free number at 1-866-343-1858 or 1-877-627-7027 (TTY).

What do I have to do:

You have two (2) choices:

- You may choose to use the Personal Credits you are entitled to for yourself and/or members of your family by completing the attached Personal Credits Acknowledgement form. See the next page for more information.
- 2. You may choose NOT to use your Personal Credits. If this is your choice, you do not have to do anything. Do NOT fill out the attached form. The value of the Personal Credits you are entitled to will remain in the CEP Trust Fund. As stated in the Indian Residential School Settlement Agreement, the funds remaining in the CEP Trust Fund once Personal Credits have been distributed will be transferred to the National Indian Brotherhood Trust Fund and the Inuvialuit Education Foundation to be used for educational programs for former students and their families.

Indian Residential Schools Settlement Agreement Personal Credits Acknowledgement Form ("form")

Instructions

The attached Personal Credits Acknowledgement form has been made just for you, so it may not be given to anyone else to use. Personal Representatives please see Step 1 - Personal Information below.

Please complete the attached form if you are choosing to take advantage of Personal Credits. Please note that the value of your Personal Credits will be sent directly to the Education Entity/Group Educational Service where you choose to use your Credits, not to yourself, your personal representatives, and/or family members.

Please read all questions and requests for information carefully before answering. Please use a black or blue ink pen. Incomplete information may lead to your request being delayed or denied.

IMPORTANT: The final deadline to submit the Personal Credits Acknowledgement form is October 31, 2014. Your Personal Credits Acknowledgement form MUST be postmarked no later than October 31, 2014 or it will be denied.

Step 1 - Personal Information:

Please review and complete Section A - CEP Recipient Information.

If you are a Personal Representative you must also complete Section B - Personal Representative's Information. Personal Representatives must also submit proof of their right to act on behalf of the CEP Recipient with the completed Personal Credits Acknowledgement form.

If someone helped you complete this form, please complete Section C.

Step 2 - Decide how you want to use your Personal Credits:

Please review and complete Section D to tell us how you would like to use your Personal Credits.

IMPORTANT: You can only choose one (1) of the options listed below. Each option can be split several ways, as listed on the Personal Credits Acknowledgement form. Once you submit your form to the Administrator you cannot change which option you have chosen.

- Option 1: Use all of your Personal Credits for yourself.
- Option 2: Use some of your Personal Credits for yourself and give some to one (1) Family Member. You must keep a minimum of \$1,000 for yourself and the combined total for yourself and your Family Member must not be greater than \$3,000. You and your Family Member may use your Personal Credits at either an Education Entity OR a Group Educational Service.
- **Option 3:** Give all of your Personal Credits to one (1) Family Member.
- Option 4: Give all of your Personal Credits to two (2) Family Members to share. You must give a minimum of \$1,000 to one (1) of the Family Members and the combined total for both Family Members must not be greater than \$3,000. Each Family Member may use your Personal Credits at either an Education Entity OR a Group Educational Service.

"Family Member" means:

- (i) the spouse, child*, grandchild, parent, grandparent or sibling of a CEP Recipient;
- (ii) the spouse of a child*, grandchild, parent, grandparent or sibling of a CEP Recipient;
- (iii) a former spouse of a CEP Recipient;
- (iv) a child* or other lineal descendent of a grandchild of a CEP Recipient;
- (v) a person of the same or opposite sex to a CEP Recipient who cohabited for a period of at least one year with that CEP Recipient immediately before his or her death;
- (vi) a person of the same or opposite sex to a CEP Recipient who was cohabiting with that CEP Recipient at the date of his or her death and to whom that CEP Recipient was providing support or was under a legal obligation to provide support on the date of his or her death;
- (vii) any other person to whom a CEP Recipient was providing support for a period of at least three years immediately prior to his or her death; and;
- (viii) a person of the same or opposite sex to a CEP Recipient who cohabited for a period of at least one year with that CEP Recipient immediately before the CEP Recipient delivered a Personal Credits Acknowledgement Form to the Agent of the Trustee;
- (ix) a person of the same or opposite sex to a CEP Recipient who was cohabiting with that CEP Recipient immediately before the CEP Recipient delivered a Personal Credits Acknowledgement Form to the Agent of the Trustee and to whom that CEP Recipient was providing support or was under a legal obligation to provide support; and,
- (x) any other person to whom a CEP Recipient was providing support for a period of at least three years immediately prior to delivering a Personal Credits Acknowledgement Form to the Agent of the Trustee.

Step 3 – Sign the Form:

Please review and complete Section E – Declaration and Signature to confirm your decision.

Step 4 – Submit the Form:

Once you have completed the form, please review it to make sure you have completed all of the applicable sections fully. Please tear out the instruction sheets from this booklet as you do not need to send them to the Administrator with your completed form. If you are a Personal Representative, please include documentation to support your authority to act on behalf of the CEP Recipient. Please write the CEP Recipient's CEP Transaction ID on each additional page submitted. Please make a copy of your documentation for your own records before sending it to the Administrator. Send the completed form and supporting documentation to:

Personal Credits Administrator
Suite 3 - 505, 133 Weber St N Waterloo, ON N2J 3G9
or fax 1-888-842-1332
or email IRSPersonalCredits@crawco.ca

Next Steps

You will receive an Acknowledgement letter by mail once your form is received to let you know that we received it. If we have any questions about your form, we will contact you by telephone and/or mail so it is important to keep us informed of any changes to your address or telephone numbers by calling 1-866-343-1858 or 1-877-627-7027 (TTY), or by mail at the address above, or by email to IRSPersonalCredits@crawco.ca. Incomplete information may lead to delays or denial of your form.

You will receive a decision letter by mail once your form has been reviewed. This decision letter will tell you what to do next. If your form is approved, the decision letter will include a Personal Credits Redemption form that you, and/or your Family Member(s), will need to provide to the Education Entity and/or Group Educational Service. The Education Entity and/or Group Educational Service will then need to fill out the Personal Credits Redemption form and send it to us in order for the Education Entity and/or Group Educational Service to receive the value of your Personal Credits.

^{*}child includes a child adopted pursuant to, or recognized by, federal/provincial/territorial laws or by custom adoption.

IMPORTANT: You may not change who you have chosen to give your Personal Credits to except in the event of death or disability of the family member prior to the submission of the Personal Credits Redemption form to the Agent of the Trustee, in which case, the Personal Credits may be transferred back to the CEP Recipient. Disability means severe, sustained mental or physical incapacity, as evidenced by a medical certificate signed by a licensed physician. Otherwise, you may change where you or your family members are choosing to use the Personal Credits if the course, program or group education service is no longer available. Only the CEP Recipient may request a change to where the Personal Credits can be used. Please contact 1-866-343-1858 or 1-877-627-7027 (TTY) for more information.

IMPORTANT DEADLINES

Deadline to submit your Personal Credits Acknowledgement form: postmarked by October 31, 2014

Deadline for Education Entity or Group Educational Service to submit Personal Credits Redemption form: **postmarked by December 1, 2014.**

All inactive files will be closed on December 1, 2014.

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Privacy Statement:

The information requested in this Personal Credits Acknowledgement form is being collected, used and retained by the Common Experience Payment ("CEP") Personal Credits Administrator ("Administrator") and its Agents for the purpose of operating and administering the CEP Personal Credits Administration pursuant to the *Personal Information Protection and Electronic Documents Act*, S.C. 2000, c. 5 ("PIPEDA"). The information will be provided to the Government of Canada in order to facilitate the administration of the CEP Personal Credits. Personal information is protected under federal legislation, including PIPEDA and the *Privacy Act*, and personal information may be used or disclosed in accordance with applicable legislation. You have the right to request access to your personal information. To do so, call 1-866-343-1858 or 1-877-627-7027 (TTY).

Section A - CEP Re	ecipient Info	rmation (F	Please ans	swer all boxes)			
CEP Transaction ID XXXXXXXXXX		Group	Group: □ Status Indian □ Non Status Indian □ Métis □ Non Aboriginal □ Inuit (Nunavut) □ Inuit (Quebec) □ Inuvialuit				
Language Preference □ English □ French Gender □ Male □ Female							
First Name XXXXXXXXXX			Middle Name(s) XXXXXXXXXX			Last Name XXXXXXXXXX	
Date of Birth (mm/dd/y XXXXXXXXXXX	ууу)	Place	Place of Birth (Province/Territory/State/Country)				
Mailing Address (No.,	Street, Apt., R.	R., P.O. Bo	P.O. Box) City/Town			Province/Territory/State	
Country	Postal Code/2	Zip Code	Telephone ()	ephone Number Email Address:			
Section B - Person	al Represen	tative's In	formation				
person is deceased, a mentally incompetent, the person is a minor both Section A and S of the CEP Recipient	an executor, actine tutor, com the tutor, com the person of section B. You	dministrator mittee, Gua r party that I MUST al s	r, estate trus ardian, cura has been so provide	stee, trustee or li- tor of the person appointed to adm proof of your aut	quidato or the F ninister thority	r of the or obtained the of the or obtained the or of the or	Representative includes, if a deceased or, if the person is ustee or their equivalent or, if or affairs. You MUST fill out a Personal Representative
I am applying on behalf of a CEP Recipient who is: I have enclosed a certified true copy of: □ an Incapable Person □ Authority to Act □ Other: □ Deceased □ Court Order □ a Minor □ Probated Will							
Representative's First Name			Representative's Middle Name(s) Representative's La			entative's Last Name	
Mailing Address (No., Street, Apt., R.R., F		R., P.O. Bo	P.O. Box) City/Town				Province/Territory/State
Country	Postal Code/	Zip Code	Telephone ()	Number –	Email Address:		
Section C - If some	eone helped	you fill ou	ut this forn	n, please provi	de that	t persor	n's information below
First Name			La	st Name			
Mailing Address (No.,	Street, Apt., R.	R., P.O. Bo	ox)		Cit	y/Town	
Province/Territory/State Cou		Country		Relationship to you:			



Section D – How would you like to us	e your Personal Credits:	
Please tell us how you wish to use your Pers	sonal Credits by completing Steps 1, 2 and 3 below. You may only choose o	ne option from Step 1.
Step 1-Check the box of the Option you are choosing below ↓	Step 2 – Check the box(es) below that relate to your choice in Step 1 ↓	Step 3 – Fill out the Part(s) on the next pages as indicated below
 Option 1: Use all of your Personal Credits for yourself. 	You choose to:	
	□ Use your Personal Credits at 1 Education Entity; or ,	Part 3
	□ Split your Personal Credits between 2 Education Entities; or,	Part 3 and Part 4
	☐ Use your Personal Credits for 1 Group Educational Service; or ,	Part 5
	□ Split your Personal Credits between 2 Group Educational Services; or,	Part 5 and Part 6
	□ Split your Personal Credits between 1 Education Entity and 1 Group Educational Service	Part 3 and Part 5
☐ Option 2: Use some of your Personal Credits for yourself and	You choose to:	
give some to one (1) Family Member. You must keep a minimum of \$1,000 for yourself and the combined total for yourself and your Family Member must not be greater than \$3,000.	☐ Use your share of your Personal Credits that you have kept for yourself at 1 Education Entity; or,	Part 3
	 Use your share of your Personal Credits that you have kept for yourself at 1 Group Educational Service; 	Part 5
	Your Family Member chooses to:	
	☐ Use his or her share of your Personal Credits at 1 Education Entity; or,	Part 1 and Part 4
	☐ Use his or her share of your Personal Credits at 1 Group Educational Service;	Part 1 and Part 6



	Option 3: Give all of your Personal Credits to one (1) Family Member.	Your Family Member chooses to:	
		☐ Use your Personal Credits at 1 Education Entity; or ,	Part 1 and Part 3
		□ Split your Personal Credits between 2 Education Entities; or ,	Part 1, Part 3, and Part 4
		☐ Use your Personal Credits for 1 Group Educational Service; or ,	Part 1 and Part 5
		☐ Split your Personal Credits between 2 Group Educational Services; or ,	Part 1, Part 5 and Part 6
		☐ Split your Personal Credits between 1 Education Entity and 1 Group Educational Service	Part 1, Part 3 and Part 5
	Option 4: Give all of your Personal Credits to two (2) Family Members	Family Member #1 chooses to:	
	to share. You must give a minimum of \$1,000 to one of the Family Members	☐ Use his or her share of your Personal Credits at 1 Education Entity; or ,	Part 1 and Part 3
	and the combined total for both Family Members must not be greater than \$3,000.	☐ Use his or her share of your Personal Credits at 1 Group Educational Service	Part 1 and Part 5
		Family Member #2 chooses to:	
		☐ Use his or her share of your Personal Credits at 1 Education Entity; or,	Part 2 and Part 4
		 Use his or her share of your Personal Credits at 1 Group Educational Service 	Part 2 and Part 6



Part 1 - Family Member #1 Information						
			Gender □ Male □ Fe	emale		
First Name	Middle Na		me(s)	Last Name		
How are they related to you? (e.g. spouse, child, grandchild, etc.)				Date of Birth (mm/dd/yyyy)		
Part 2 - Family Member	#2 Informa	ition				
Language Preference □ English	French		Gender □ Male □ Fe	male		
First Name		Middle Na	me(s)	Last Name		
How are they related to you? (e.g. spouse, child, grandchild, etc.	Date of Birth (mm/dd/yyyy)					
Part 3 - Education Entity	/#1 Inform	ation				
Who is attending Education Entity #1 (check the box): ☐ Myself ☐ Family Member #1 ☐ Family Member #2			How much of the \$3,000 in Personal Credits do you wish to use here?			
Name of Education Entity						
City/Town	Province/Territory/State (ate	Country		
Part 4 - Education Entity #2 Information						
Who is attending Education Entity #2 (check the box): ☐ Myself ☐ Family Member #1 ☐ Family Member #2			How much of the \$3,000 in Personal Credits do you wish to use here?			
Name of Education Entity						
City/Town	Province/Territory/State		ate	Country		



Group Educationa	i Service Informat	ion:		
Terms and Condition 1-866-343-1858 or 1-	ons found on the (-877-627-7027 (TTY)	are choosing to give your Personal Official Court website at		



Part 6 - Group Edu	ucational Ser	vice #2 Information			
Who is attending Group Educational Service #2 (check the box): ☐ Myself ☐ Family Member #1 ☐ Family Member #2					of the \$3,000 in edits do you wish to
Name of Group Educational	Service:				
City/Town	Province/Terr	ritory/State	Country		
Personal Credits that you ha	ave given to the	e person who is attending Group at person to be used for Group Edu d write your CEP Transaction ID at	cational S	Service #2. If y	
How the Personal Credits	will be used	Program Date	L	ocation	Amount (\$CDN)
Example: Group cultural dar	nce program	February 1, 2014-June 1, 2014	Fro	g Lake, AB	\$1,000
	Co				
Additional supporting docum	nentation attacl	hed (e.g. publicly available program	informat	tion): 🗆 Yes 🗈	No

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Section E - Declaration and Signature

This section must be completed by the CEP Recipient or the Personal Representative with the authority to act on behalf of the CEP Recipient who is deceased, a minor, or an incapable person. Please read the following declaration carefully before signing.

Declaration: I have completed the Personal Credits Acknowledgement form and I have decided how and where I wish to use my Personal Credits. I understand that the Administrator will be reviewing my Personal Credits Acknowledgement form for completeness and may need to contact me by telephone or mail to request additional information. I understand I may be requested to provide confirmation of family relationship if I choose to give any portion of my Personal Credits to a family member (e.g. birth certificate). I understand that once I submit the Personal Credits Acknowledgement form that I cannot change to whom I have given my Personal Credits.

If the combined value of the Personal Credits you have listed on your Personal Credits Acknowledgement form totals less than \$3,000 CDN, the value of any unused portion of your Personal Credits will remain in the CEP Trust Fund until the transfer to the National Indian Brotherhood Trust Fund and the Inuvialuit Education Foundation takes place, following the final Personal Credits deadline.

I agree to the sharing of my personal information, including but not limited to my contact information, with the Government of Canada and necessary third parties authorized by the Court, only for the purposes of processing my request to use Personal Credits, including for the development of Group Education programs and services (please check box) \square Yes \square No

By signing below, I indicate my agreement to the contents of this Declaration.

CEP Recipient/Personal Representative:				
Print Name:	Signature:			
Date:(mm/dd/yyyy)	- \			
Signature with a Mark: If the person signed with a mark (for examp be a relative. The witness must complete the				
Witness' First Name	Witness' Middle Name(s)	Witness' Last Name		
City/Town	Province/Territory/State	Country		
Relationship to CEP Recipient				
Witness Declaration: I have read the content of this Personal Credits Acknowledgement form to the CEP Recipient or Personal Representative who understands and confirms the information and who made his or her mark in my presence.				
Print Name: Signature:				
Date:(mm/dd/yyyy)	_			

Return the completed Personal Credits Acknowledgement form with any supporting documentation to the Personal Credits Administrator, Suite 3 - 505, 133 Weber St N, Waterloo, ON N2J 3G9 or fax 1-888-842-1332 or email IRSPersonalCredits@crawco.ca. Your Personal Credits Acknowledgement Form must be postmarked no later than October 31, 2014 or it will be denied.