 

CASE PLAN – ONTARIO FINANCIAL EMPOWERMENT CHAMPION PROGRAM

RESP / CLB SIGN UP

DATE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

CLIENT NAME: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

CHILD NAME & AGE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

DMS CASE NUMBER: \_\_\_\_\_\_\_\_\_

CLIENT CONTACT: (TEL) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (EMAIL):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

SmartSAVER ONLINE FORM COMPLETED: \_\_\_\_\_Y \_\_\_\_\_ N

APPOINTMENT DATE WITH FINANCIAL INSTITUTION: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

FINANCIAL INSTITUTION CHOSEN: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

NEXT STEPS:

CONFIRMATION OF RESP: \_\_\_\_\_ Y \_\_\_\_\_ N

CONFIRMATION OF CLB: \_\_\_\_\_Y \_\_\_\_\_N