

<b>CHILD AND FAMILY CONNECTIONS</b> <b>TAX SAVINGS ACCOUNT INFORMATION SHEET</b>
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Child and Family Connections (CFC) Offices are to use this form in addition to the *CFC Fax Cover Sheet for Insurance Benefits Verification Requests/Updates* when requesting an exemption. The CFC must also ensure the family is aware of potential Family Participation Fees when using exemptions or waivers. Failure of a family to provide the necessary information may result in inaccurate information from the tax savings plan verification process. This may result in funds withdrawn unnecessarily.

<b>Child Information</b>
Name:
Date of Birth:
Child's EI Number:
CFC Number:

<b>Plan Holder Information (family member who owns the tax savings plan):</b>
Name:
Date of Birth:
Phone Number:
Last 4 digits of Social Security Number:

<b>Tax Savings Plan Information (name of company administering the funds):</b>
Company/Plan Name:
Company/Plan Phone Number:
Representative's Name:
Group #:
Other ID #:
Effective Begin Date:
Effective End Date:
Automatic Withdraw: <input type="checkbox"/> Yes <input type="checkbox"/> No
Comments:

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