

## RBC Royal Bank® Discount Adjustment Claims Form

With several of RBC's banking packages, clients receive a discount on their annual Safe Deposit Box rental fee. After reviewing our billing records for Safe Deposit Boxes, we discovered that some clients were not receiving the discounts they were eligible for through their banking package. Payment adjustments have already been made to clients whom RBC has been able to identify.

If your box was closed prior to 2002 you may have a claim if you meet the criteria set out below. In addition, if you received an adjustment for a box that was opened prior to 2002 and remained open after 2002 or you received an adjustment but believe you are entitled to an additional amount based on a different application of the available discounts, you may request a review by completing a claims form.

Please review the following criteria to determine if this claims process applies to you. To qualify for a payment adjustment you need to meet **all** the following criteria:

- ❖ You have or had a safe deposit box **and** a banking package account that offers annual discounts towards Safe Deposit Box rental fees ("[eligible banking package](#)"), and the discount was not fully applied to your rental fees.
- ❖ You meet the above criteria and have not received a payment adjustment from RBC or you already received a payment adjustment from RBC but believe you may be entitled to a different amount.

### **Eligible Banking Packages and Discount Amounts (as at January 01, 2006):**

RBC BANKING PACKAGE	SAFE DEPOSIT BOX RENTAL DISCOUNT <i>(as at January 01, 2006)</i>
Royal Certified Service®	Annual discount of \$12
Royal V.I.P Service®	Annual discount of \$35**
RateLink Essential®	Annual discount of \$30
RateLink Preference®	Annual discount of \$40
Private Banking	Fees are waived
Sixty-Plus®* (no longer offered)	Annual discount of \$5

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\* *This discount only applies to safe deposit boxes open on or before December 15, 2000.*

\*\* *Effective July 1, 2006 the annual rental discount for Royal V.I.P. Service is \$40.*

**Note:** Some discount values have changed since first available and this may affect your claim. Refer to <http://www.rbc.com/sdb> for previous discount amounts.

By submitting a completed Claims Form, you are requesting us to investigate whether you are entitled to a payment adjustment / additional payment adjustment. We will respond to your request within four to six weeks.

_____ Surname	_____ First Name	_____ Initial(s)
_____ Suite/Apt. #	_____ Street Address	
_____ City ( )	_____ Province ( )	_____ Postal Code
_____ Home Phone 4519	_____ Work Phone	
_____ RBC Client Card (16 digits)	_____ Banking Package Account (example 0001-0000000)	

\_\_\_\_\_  
Branch Address where Account is held

\_\_\_\_\_  
Safe Deposit Box Number

\_\_\_\_\_  
Branch Address where Box is held – Transit # (the 5 digits preceding the account # on your cheques)

**PLEASE COMPLETE THE FOLLOWING INFORMATION TO THE BEST OF YOUR ABILITY:**

**Note:** *If you are not sure about any of the specific information we are requesting, please complete with your best recollection of approximate date, year, etc.*

When did you open your **banking package account**? \_\_\_\_\_ / \_\_\_\_\_ (Month/Year)

Is your RBC Royal Bank banking package account currently open?  Yes  No

If closed, when was this account closed? \_\_\_\_\_ / \_\_\_\_\_ (Month/Year)

Is this is a joint account?  Yes  No

- o If yes, please list the other account holders:

\_\_\_\_\_  
What is the banking package name for this account?  
(e.g., Royal Certified Service, VIP)

What is/was the monthly fee paid for this banking package? \$ \_\_\_\_\_

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When did you open your RBC **Safe Deposit Box**? \_\_\_\_\_ / \_\_\_\_\_ (Month/Year)

Is your Safe Deposit Box currently open?  Yes  No

If closed, when was this box closed? \_\_\_\_\_ / \_\_\_\_\_ (Month/Year)

Is this box is held jointly?  Yes  No

- o If yes, please list the name of the other box holders:

What is/was the annual rental fee for this box? \$ \_\_\_\_\_  
 (Hint: look at the charge account January statement)

Is the annual rental fee debited from one of your accounts with RBC?  Yes  No

- If yes, please provide the following: \_\_\_\_\_  
 Change Account #

\_\_\_\_\_ Charge Account Branch Address & Transit #

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Did you receive a payment adjustment cheque from RBC?  Yes  No

If yes, please provide amount and cheque # \$ \_\_\_\_\_

Cheque # \_\_\_\_\_

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### Supporting Documentation

Please enclose the following:

- A copy of the banking package monthly bank statement or a copy of the banking package bankbook for the period being claimed.
- A copy of the Safe Deposit Box Lease Agreement.
- If an account is debited for the annual rental fees ("*charge account*"), please enclose a copy of the bank statement showing this fee going through the account. Annual fees are debited in January of each year.
- Any other documentation which may assist us in investigating your claim.

***We may contact you if further information or clarification is required in order to assess your claim.***

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### Payment of Verified Claims

Please select **one** of the payment methods below. We will follow these instructions if your claim is approved:

Credit my RBC account?

Yes  No

If "yes", please provide the following:

- RBC account number you would like us to credit.

\_\_\_\_\_

Transit #

\_\_\_\_\_

Account Number

- Name of account holder(s)

\_\_\_\_\_

I prefer to receive a cheque in the mail  
(If "yes", a draft / money order will be issued to you)

Yes  No



### Declaration

I hereby declare that to the best of my knowledge the information provided above is complete and accurate.

Date \_\_\_\_\_ Client Signature \_\_\_\_\_

**Please mail this form along with all supporting documentation to RBC Royal Bank before April 30, 2007 to the address below:**

RBC Royal Bank  
SDB - Claims, Transit #5413  
PO BOX 6001 STN CENTRE VILLE  
MONTRÉAL QC H3C 3A9

**PLEASE KEEP A COPY OF THIS FORM, AND ANY DOCUMENTS YOU ATTACH, FOR YOUR OWN RECORDS.**