



# Transfer Authorization for Registered Investments

This form can be used for RSP to RSP transfers (except for transfers due to death), RSP to RIF transfers, and RIF to RIF transfers. This form may be used in place of T2033(e).

## A: Client Identification

Account/Policy Holder Last Name	First Name	Init	
Address	City	Province	Postal Code
Social Insurance Number	Home Telephone Number	Business Telephone Number	
-	( )	-	( ) -

## B: Receiving Institution Information

**Olympia Trust Company** Client S/D#

2200, 125 – 9<sup>th</sup> Avenue S.E. Calgary, Alberta T2G 0P6  
 Telephone (403) 770-0001 Fax: (403) 261-7523  
 Toll Free 1-877-565-0001

Olympia Trust Contact Name:

Registered Type:

<input type="checkbox"/> RRSP	<input type="checkbox"/> LRSP	<input type="checkbox"/> RRIF	<input type="checkbox"/> LIF
<input type="checkbox"/> RRSP Spousal	<input type="checkbox"/> RLSP	<input type="checkbox"/> RRIF Spousal	<input type="checkbox"/> RLIF
<input type="checkbox"/> LIRA	<input type="checkbox"/> NEW LIF	<input type="checkbox"/> LRIF	<input type="checkbox"/> Prescribed RIF

## C: Client Direction to Relinquishing Institution

Relinquishing Institution Name

Address	City	Province	Postal Code
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Client Account/Policy Number: \_\_\_\_\_

Transfer of Publicly Traded Securities  
 Canadian Transfers  
 FINS # 7815 CUID: QTRD  
 ACCT # Q5K5AGHA DTC: 5009

*Olympia Trust Company must be advised of any deliveries to our account at Otrade Securities Inc. prior to the transfer being set up.*

### Transfer the following: (choose one)

- A. Full Account:  In-Cash  In-Kind
- B. Partial In-Cash \$ \_\_\_\_\_ NET (must complete area below)
- C. Partial In-Kind \$ \_\_\_\_\_ NET (must complete area below)

D.		DOLLAR AMOUNT OR ALL	FUND NUMBER OR STOCK NAME
<input type="checkbox"/> In-Cash <input type="checkbox"/> In-Kind	\$	ALL	
<input type="checkbox"/> In-Cash <input type="checkbox"/> In-Kind	\$	ALL	
<input type="checkbox"/> In-Cash <input type="checkbox"/> In-Kind	\$	ALL	
<input type="checkbox"/> In-Cash <input type="checkbox"/> In-Kind	\$	ALL	
<input type="checkbox"/> In-Cash <input type="checkbox"/> In-Kind	\$	ALL	

## D: Client Authorization

i) I hereby request the transfer of my investments as described above.

ii) I understand that it is my sole responsibility to ensure that this form has been completed accurately and in full. Any omissions or errors may result in delays due to the rejection of the transfer by the other institution.

iii) Where I have requested to transfer in cash, I authorize the liquidation of all or part of my investments and agree to pay any applicable fees, charges or adjustments.

I confirm that I have attached a recent statement from the relinquishing institution named above.

E-Mail Address: \_\_\_\_\_ (Olympia will e-mail you upon receipt of the funds)

Date: \_\_\_\_\_ Signature of Account Holder:   x  

## E: For Use By Relinquishing Institution Only

- |  |   |
|--|---|
| <input type="checkbox"/> RRSP            | <input type="checkbox"/> LRIF           |
| <input type="checkbox"/> LIRA            | <input type="checkbox"/> LIF            |
| <input type="checkbox"/> LRSP            | <input type="checkbox"/> NEW LIF        |
| <input type="checkbox"/> RRIF            | <input type="checkbox"/> RLIF           |
| <input type="checkbox"/> O Qualified     | <input type="checkbox"/> RLSP           |
| <input type="checkbox"/> O Non-Qualified | <input type="checkbox"/> Prescribed RIF |

Spousal Plan	Last Name	First Name	Init.
<input type="checkbox"/> No <input type="checkbox"/> Yes if yes:			
Locked In Funds:	Locked In Funds	Governing Legislation	Social Insurance Number (Spouse)
<input type="checkbox"/> No <input type="checkbox"/> Yes if yes:	\$	-	-
Contact Name	Telephone Number	Fax Number	
	( ) -	( ) -	
Date	Amount Transferred	Authorized Signature	
	\$		

Copy 1 – Relinquishing Institution's Copy Copy 2 – Client's Copy

### Privacy Notice

At Olympia Trust Company, we take privacy seriously. In providing services to you, we receive non-public, personal information about you. We receive this information through transactions we perform for you and may also receive information about you by virtue of your transactions with affiliates of Olympia Trust Company or other parties. Olympia Trust Company is committed to respecting and protecting the confidentiality of your personal information and the safeguarding of all personal information entrusted to us. We have prepared a Privacy Policy to tell you more about how we protect your personal information. It is available on our website at [www.olympiustrust.com](http://www.olympiustrust.com).