

MUTUAL FUND TRANSFER REQUEST

**Give the gift of time
in just three steps...**

○ Step 1

Complete all sections of this form. This can be done with your broker/advisor.

○ Step 2

Send this completed form to:

**University of Ottawa Heart
Institute Foundation**

Mr. David Bennet – Finance
40 Ruskin Street,
Room 2408
Ottawa, ON K1Y 4W7
Phone: 613-696-7264
Fax: 613-696-7174
dbennet@ottawaheart.ca

Securities are transferred anonymously. Sending us this completed form will ensure you receive an official tax receipt.

○ Step 3

Fax or email the completed form to your broker or advisor.

NOTE: Funds may be returned to transferring institution if a copy of this letter has not been faxed to Scotiabank. Failure to provide sufficient details on this letter may also result in failure to settle.

BROKER / ADVISOR

○ Please fax or email this completed form to:
1832 Asset Management LP
Attention: Kinga Kaczorowska
40 King St. West, 48th Floor
Toronto, ON M5H 1H1
Phone: 416-365-5174
Fax: 416-365-5000
kinga.kaczorowska@1832.ca

SECTION 1 (TO BE COMPLETED BY DONOR)

Donor Name: _____

Donor's Brokerage Firm: _____

Donor's Broker/Contact: _____

Brokerage Account # _____

Donor's Brokerage Address: _____

Brokerage Phone # _____ Fax # _____

Broker's Email Address: _____

TRANSFER INSTRUCTION (Please use a separate form for each Fund):

Fund Name: _____

#of Units: _____ x Price per Unit: \$ _____ = \$ _____ Total Value

Date of Transfer Request: _____

SECTION 2 (TO BE COMPLETED BY BROKER)

Electronic Share Canadian/US Securities: Dealer Rep Code 9155,
Intermediary BNSG

Transfer to Scotiabank
FAX: 1-866-343-1158
In the name of University of Ottawa Heart Institute
Foundation

Beneficiary Account # 7804880719

FINS	CUID	DTC
T525	BNSC	4816

DONOR SIGNATURE: _____

DATE: _____

Thank you for your kind consideration.

If you have any questions regarding this form or your donation, please contact:
Mr. David Bennet, Finance Officer, University of Ottawa Heart Institute Foundation at
613-696-7264 or dbennet@ottawaheart.ca