

SECURITY/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

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

○ Step 3

Email or fax the completed form to your broker or advisor.

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

BROKER /ADVISOR

- Please email or fax this completed form to:

Scotia McLeod
Attention: Douglas Lai
350 Albert St., Suite 2100
Ottawa, ON K1R 1A4
Phone: 613-782-6742
Fax: 613-782-6737
douglas.lai@scotiawealth.com

SECTION 1 (TO BE COMPLETED BY DONOR)

Donor Name: _____

Donor Address: _____

Donor's Brokerage Firm: _____

Donor's Broker/Contact: _____

Donor's Brokerage Account # _____

Brokerage Address: _____

Brokerage Phone # _____ Fax # _____

Broker's Email Address: _____

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

Security/Fund Name: _____

CUSIP/ISIN/SEDOL Number: _____

Quantity: _____ Date of Transfer Request: _____

SECTION 2 (TRANSFER DETAILS FOR BROKER)

Electronic Share: Canadian/US Securities: Dealer Rep Code 9155/7MK,
Clear Stream #: 52065

Transfer To: Scotia McLeod
FAX: 613-782-6737

In the name of University of Ottawa Heart Institute Foundation
Beneficiary Account# 825-36159-11

FINS: T085
CUID: SCOT
DTC: 5011

Please ensure you have the most recent version of this form, with the most up to date account information, by downloading the form from our website at the time of your gift.

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