UNIVERSITY OF OTTAWA HEART INSTITUTE
INSTITUT DE CARDIOLOGIE DE L'UNIVERSITÉ D'OTTAWA

FOUNDATION
FONDATION

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:

Jessica Roback
jroback@ottawaheart.ca
613-875-9605

University of Ottawa Heart Institute Foundation
40 Ruskin Street,
Ottawa, ON K1Y 4W7

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 or funds may be returned to the transferring institution if a copy of this letter is not faxed to Edward Jones. Incomplete or insufficient information may also result in the transfer failing to settle. Edward Jones' processing timelines range from 3-10 business days for stock transfers and 7-20 business days for in-kind mutual fund transfers.

BROKER /ADVISOR

◯ Please email or fax this completed form to:

Edward Jones
Attention: Steve McIlroy
steve.mcilroy@edwardjones.com
Fax: 1-877-730-4732
Phone: 613-742-6811
361 St. Laurent Blvd
Ottawa, ON K1K 2Z7

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 Dealer Rep Code 9844/3Y7

Transfer To: Edward Jones
FAX: 1-877-730-4732
In the name of University of Ottawa Heart Institute

Beneficiary Account#
20664773-1-2 Branch
04241
FINS # T713
DTC
5012
CUID # EDJC

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:
Jessica Roback,University of Ottawa Heart Institute Foundation at
613-875-9605 or jroback@ottawaheart.ca