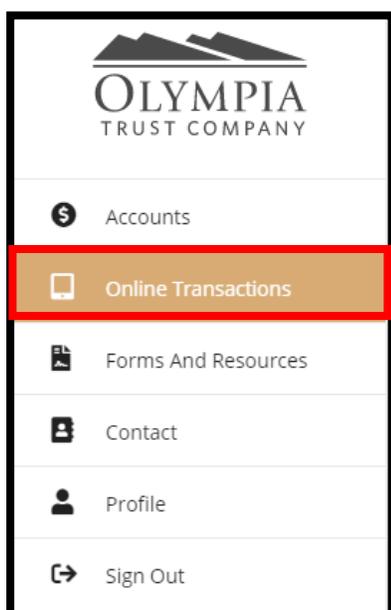# Olympia Online Transfer-In Guide
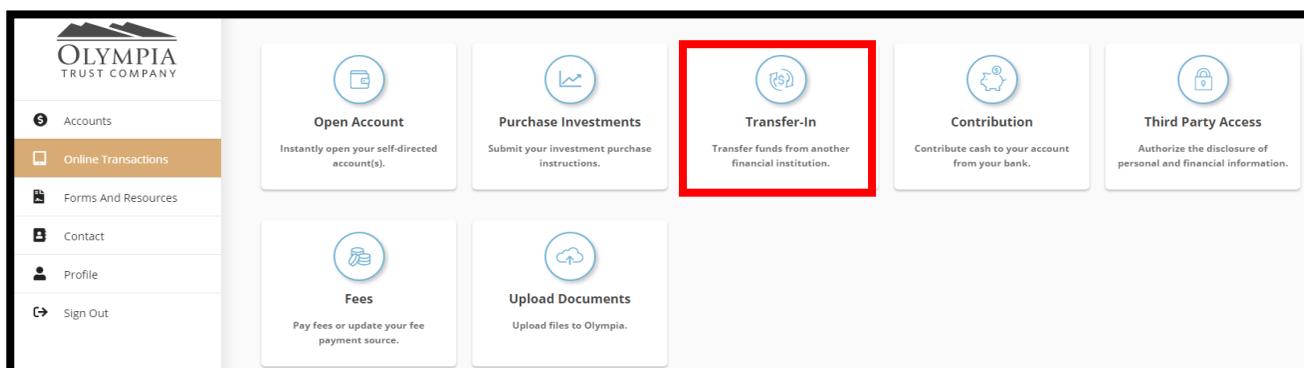
Step 1:

Click on **Online Transactions** on the left-hand side.
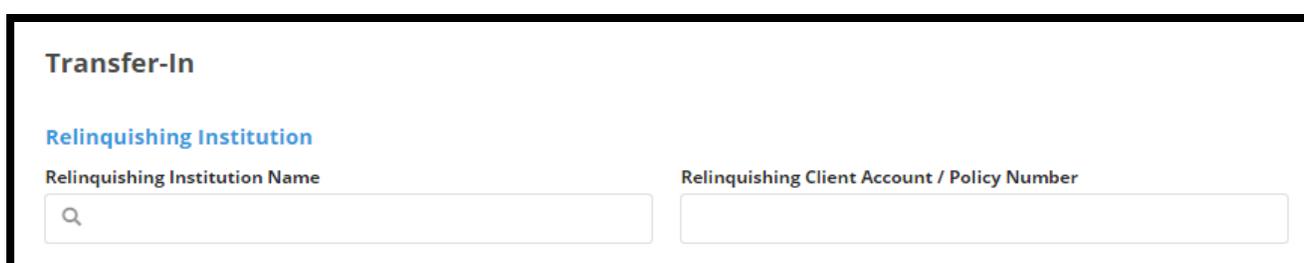

Step 2:

Click on the third option **Transfer-In.**
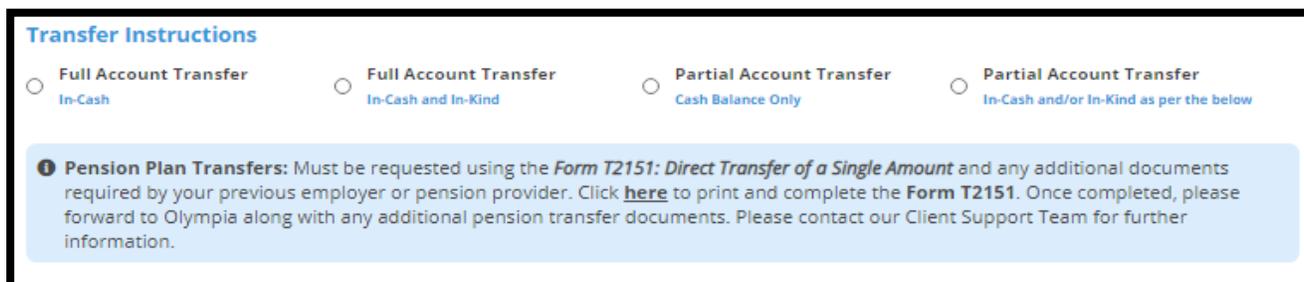

Step 3:

Complete the **Relinquishing Institution Name.** The Relinquishing Institution name will pull directly from OTC's database.

Step 4:

Select appropriate **Transfer Instructions.**

a) Full Account Transfer – In-Cash **(Liquidate account(s) and transfer full balance as cash)**
b) Full Account Transfer – In-Cash and In-Kind **(NOT APPLICABLE)**
c) Partial Account Transfer – Cash Balance ONLY **(Transfer full cash balance)**
d) Partial Account Transfer – In-Cash and / or In-Kind as per instructions **(Transfer an amount specified | In-kind transfer not applicable)**

Step 5:

Select appropriate *Transfer-In Account* and select "Hosper Mortgage" as the *Associated Third Party.*

Select Transfer-In Account

○ RRSP

Associated Third Party Select third party associated with this transfer-in request

HOSPER MORTGAGE ▾

Step 6:

Click to *Accept the Terms & Conditions.*

ⓘ Transfer-In Terms & Conditions
   i) I hereby request the transfer of my investment(s) as described above.
   ii) I understand it is my sole responsibility to ensure this request 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.
   iv) I understand all funds received in a non-Canadian currency will be converted into Canadian currency at the rate actually received by Olympia when such conversion occurs.

☐ I Accept the Terms & Conditions

Step 7:

Click to *Submit Transfer-In.*

> SUBMIT TRANSFER-IN

Important Info: If the *Relinquishing Institution*, selected in **Step 1**, accepts the transfer requests electronically you will not be required to sign a Transfer Authorization Form. If the Relinquishing Institution does require a Client Signature, you will be prompted to print and sign in *Section 5* of the *Transfer Authorization Form*.

Once signed, you can forward the document via **Email** (rrspprocessing@olympiatrust.com) **Fax** (**1.403.776.8679**) or by utilizing the **Upload Documents** feature located on the Online Transactions page. Below is a sample of the message you will receive if their signature is required.

(!)

ABC Bank Canada

Requires Your Signature

Click below to print your Transfer-In request and sign in **Section 5: Client Authorization**.

Please forward signed copy to Olympia via:

Email: rrspprocessing@olympiatrust.com

Fax: 1.403.776.8679

Document Upload: Utilize the *Upload Documents* feature located on the *Online Transactions* page

Once received, Olympia will action your Transfer-In request.

PRINT PRE-FILLED TRANSFER AUTHORIZATION FORM

TRANSFER-IN ADDITIONAL FUNDS

FINISH

You're done!