

Northside MIC – Transfer-In Instructions

- 1) Click on **Online Transactions**
- 2) Click on **Transfer-In**
- 3) Complete the **Relinquishing Institution Name**
 - The Relinquishing Institution name will pull directly from our database and will ensure you provide Olympia Trust Company with the appropriate signature, as required by the relinquishing financial institution.
- 4) Select appropriate **Transfer Instructions**
 - a. Full Account Transfer – In-Cash
 - b. Full Account Transfer – In-Cash and In-Kind
 - c. Partial Account Transfer – Cash Balance ONLY
 - d. Partial Account Transfer – In-Cash and / or In-Kind as per instructions
 - If choosing Option **d.** above, you are required to complete the partial transfer instructions, including the **Transfer Type** (*In-Cash* or *In-Kind*), **Transfer Details** (*NET Amount* or *NUMBER of Securities* or *ALL*), **Quantity** (Applicable when selecting *NET Amount* or *Number of Securities*) and identify **Stock Name / Number / Symbol** OR **Cash Account Name**
- 5) Select appropriate **Transfer-In Account**
- 6) Select **Associated Third Party** (if applicable)
 - On the dropdown, select **Northside Mortgage Investment Corporation** as the party you are working with to complete this transfer-in request (as shown below). This step is only required if you have signed a **Third-Party Letter Of Authorization** for **Northside Mortgage Investment Corporation**.

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

Northside Mortgage Investment Corporation ▼

Northside Mortgage Investment Corporation

NO THIRD PARTY ASSOCIATED WITH THIS TRANSFER

- 7) Click to **Accept the Terms & Conditions**
- 8) Click to **Submit Transfer-In**

Important Info: If the **Relinquishing Institution**, selected in **Step 3**, accepts their transfer requests electronically you will not be required to sign the 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 to Olympia Trust Company via:

- **Email:** rrsprocessing@olympiatrust.com
- **Fax:** **1.403.776.8679**
- **Upload Documents** feature located on the **Online Transactions** page

Below are sample messages you will receive regarding the signature requirements.

Signature Required



**ABC Bank / ABC Banque
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: rrsprocessing@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

No Signature Required



Your Transfer-In request was
successfully submitted and will be
actioned.

TRANSFER-IN ADDITIONAL FUNDS

FINISH