

Olympia is pleased to offer the ability to hold exempt market securities within self-directed accounts. This requires the receipt and approval of the following documents:

1. **Letter of Direction, Waiver, and Indemnity** (Olympia form) completed and signed by the client.
2. **Subscription Agreement** completed and signed by the client.
3. **Original copy of certificate.**
 - Global certificates are preferred and must be issued to “Olympia Trust Company” with a client breakdown provided.
 - Original certificates must be sent to our office in Calgary to the attention of RRSP Securities.
 - Olympia must receive the original certificate **prior to funding**, unless the issuer has determined that the funds are being released to a lawyer.
 - If funds are released to a lawyer in trust, Olympia must receive the original certificate within 21 days after funding.
 - If individual certificates are needed to be issued, they must be issued to “Olympia Trust Company ITF [Client Name], Account #[Client’s Account Number].”

All documents will be reviewed by Olympia for accuracy **prior to funding**. All documents other than certificates can be faxed or emailed for review. Funds will be released within 48 hours after receipt of the completed documents and original certificate.

Three options are available for Olympia to release funds:

1. **Wire transfer:** Funds will be transferred directly from Olympia’s account to the issuer or lawyer’s account.
 - To set up this option, the receiving party must complete a *Wire Information Request Form* and provide a void cheque for the account.
 - Olympia does not charge a fee for this option. The receiving institution may charge a fee to the party receiving the wire.
 - The daily wire cut-off time is 12:30pm MT.
2. **Direct deposit:** Olympia will issue a cheque and send it by courier to the bank on the same day for deposit into the issuer or lawyer’s account.
 - To set up this option, a void cheque of the account is required.
 - The daily direct deposit cut-off time is 2:30pm MT.
3. **Cheque:** Olympia will issue a cheque that can be sent by courier to the issuer or lawyer, or held for pickup at our office in Calgary. Our office is open until 4:30pm MT.