OTG Financial Inc. 2225 Sheppard Ave. E., Suite 1105 Toronto ON M2J 5C2
Tel: 416.752.6843
1.800.263.9541
Fax: 416.752.6649
1.888.662.2209
www.otgfinancial.com

Transaction Request

NAME: _____

ACCOUNT NUMBER

U PLEASE CHECK

- ☐ RRSP
- ☐ NON-REGISTERED
- ☐ RRIF
- ☐ RESP

Name of Joint Owner or Contributing Spouse: _____
(If applicable)

Lump Sum Contribution to existing account

Attached is a cheque, payable to OTG Financial Inc., to be deposited to the account number indicated above.

CHEQUE AMOUNT: _____

THIS AMOUNT IS TO BE INVESTED AS FOLLOWS:

	$ (Dollar)	¢
OTG MONEY MARKET FUND		
OTG MORTGAGE & INCOME FUND		
OTG DIVIDEND FUND		
OTG BALANCED FUND		
OTG DIVERSIFIED FUND		
OTG GROWTH FUND		
* OTG GLOBAL FUND		

* (Registered Plans ONLY, Maximum **30%** of total)

Withdrawal

I hereby direct that, either ☐ the amount of $ _____ or ☐ the entire balance in my account be converted to cash in accordance with the provisions of the plan and pay the cash proceeds to me.

Send cheque via:

If REGISTERED plan please indicate if withdrawal is GROSS ☐ NET ☐

- ☐ MAIL
- ☐ EFT

Special Instructions: _____

Switch

I hereby direct that certain assets presently held in my account be exchanged for an equivalent value in units of the Fund(s) as indicated below. I understand that units are evaluated at the close of each business day.

SWITCH FROM:	INDICATE SELECTION		
Fund Name	Units	$	%

SWITCH TO:	INDICATE SELECTION		
Fund Name	Units	$	%

Y Y Y Y M M D D
DATE

PLANHOLDER SIGNATURE

JOINT SIGNATURE (if required)

KYC Verified By: