

INTRODUCING BMO GUARANTEED INVESTMENT FUNDS (BMO GIF)

BMO Life Assurance will be introducing SEGREGATED FUNDS this fall. Watch for announcements from our Business Development Team for upcoming seminars. Some of the key features include:

- A market leading Maturity Benefit Guarantee with automatic resets
- Wrapped BMO ETF bundles managed by BMO Asset Management Inc., one of Canada's leading investment managers and creators of BMO ETFs
- Highly competitive Death Benefit Guarantee, compensation and MERs

To ensure a smooth entry into the segregated fund market, we want to make sure that our records are updated to properly support you and your advisors.

Please complete and return the attached Registration Form by October 7th via email to insurance.segregatedfunds@bmo.com. This information is important to help with our initial set-up.

If you already transact business electronically through FUNDSERV, please include your code on the Registration Form. You may continue to use this FUNDSERV code for BMO GIF business.

If currently you do not use FUNDSERV to transact segregated fund business and you wish to submit paper applications for BMO GIF, you must obtain a FUNDSERV code as it is required for our internal administration. However, you may still submit paper transactions. You can obtain a FUNDSERV code at <http://www.fundserv.com/>. Become a Customer – Get Connected >Distributor.

Once you return the completed Registration form we will send you a Dealer Package, which includes a listing of all advisors that have submitted business to BMO Life within the last 24 months. This listing will require you to provide the segregated fund code currently being used to identify your advisor's segregated fund business through you.

Please note that all advisors will have a 2nd BMO code for their BMO GIF business. However, all segregated fund and life business will be combined on production reports.

We are looking forward to this exciting new venture and working closely to ensure a smooth implementation.

Please ensure you return this by October 7th. Should you have any questions regarding this 1st step please do not hesitate to contact me.

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