

Personal information — Preference change form

Last name					First name														
Account #1					Account #2					Account #3					Account #4				

Our commitment to you

BMO Financial Group appreciates the opportunity to help you meet your financial needs. From the day Bank of Montreal was founded in 1817, earning and keeping your trust has been at the very core of our business. We are committed to respecting and protecting the privacy and confidentiality of the Personal Information you have entrusted to us. It is important for you to understand what Personal Information we will collect, how we will use it, and who may see it.

Please read our Privacy Code, which is available to you from your Investment Advisor or by visiting our website at www.bmo.com/nesbittburns.

When we collect your Personal Information, we may use or disclose it to:

- verify your identity;
- provide and manage products and services you have requested;
- understand your financial services requirements;
- protect against fraud and manage risk;
- determine suitability of products and services for you;
- better manage your relationship with us;
- determine your eligibility for certain products and services of ours, or products or services of others;
- comply with legal or regulatory requirements, or as otherwise permitted by law;
- communicate with you regarding products and services that may be of interest;
- understand our customers and to develop and tailor our products and services; and
- respond to any questions you may have.

If a new purpose for using your Personal Information develops, we will identify that purpose.

Sharing of your Personal Information

Your Personal Information may be shared, to the extent permitted by law, within BMO Financial Group to ensure we have correct or up to date information about you, to better manage your relationship with BMO Financial Group and provide a better client experience.

► Consent to further sharing

With a more comprehensive understanding of your relationships within BMO Financial Group, we will be better able to serve you and meet your needs as they grow and change.

Please check one option:

I consent I DO NOT consent

to BMO Nesbitt Burns sharing information in relation to my account(s) within BMO Financial Group. I understand that I cannot opt out of sharing my Personal Information where I have requested a product or service that is jointly offered by BMO Nesbitt Burns and another member of BMO Financial Group.

► BMO Financial Group direct marketing preferences

Direct Marketing is our communication with you such as mail, telemarketing or email, using the contact information you have provided, to inform you about products and services that we think may be of interest and value to you. Your consent is not required for us to communicate with you regarding products or services that you currently have, including improved ways to use the products, or additional features of the products as well as transactional information.

Please check one option:

I consent I DO NOT consent

to receive direct marketing materials from BMO Nesbitt Burns or other members of BMO Financial Group.

I certify that the information on this form is true and complete; the information on this form shall supersede information previously provided; and the terms and conditions of my BMO SmartFolio Investment Management Agreement remain in effect.

Client signature 	Date (DD-MMM-YYYY)
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