




BMO SmartFolio/BMO Nesbitt Burns Consent to View Form

By completing the BMO SmartFolio / BMO Nesbitt Burns Consent to View Form you are providing the BMO Nesbitt Burns Investment Advisor (“IA”) indicated on this form with consent to have “view only” access to your BMO SmartFolio account. “View only” access provides the IA with the ability to combine your BMO SmartFolio account with other accounts within your household that are held with the IA at BMO Nesbitt Burns for the purpose of producing performance and portfolio reporting for your household, if applicable. Your consent to this “view only” access may be withdrawn at any time by contacting the IA or the BMO SmartFolio branch.

Please complete this form in its entirety. Once completed, the BMO Nesbitt Burns IA indicated on this form should forward it to smart.folio@bmo.com.

▶ Client name(s)		
▶ Investment Advisor name	▶ IA code	▶ IA phone

I/We consent to the Investment Advisor noted on this form having “view only” access to my/our BMO SmartFolio account for the purpose of maintaining my/our relationship with the IA. I/We acknowledge that the IA indicated on this form will not provide any investment advice or recommendations regarding my/our BMO SmartFolio account; however, as my/our investment needs evolve or change, the IA may propose other BMO Nesbitt Burns products or services. I/We acknowledge that I/we are not obligated to act on any product or service proposed by the IA.	
▶ BMO Nesbitt Burns client account number (if applicable)	
Client # 1 signature 	Date (DD-MMM-YYYY)
Client # 2 signature (if applicable) 	Date (DD-MMM-YYYY)
Investment Advisor signature 	Date (DD-MMM-YYYY)

New BMO SmartFolio Confirmation — FOR HEAD OFFICE USE ONLY	
<input type="checkbox"/> New SmartFolio account set-up completed	Date (DD-MMM-YYYY)
Smartfolio account number	

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