



ACCOUNT TRANSFERS AND FUTURE DEPOSIT ALLOCATION

Instructions

- This form can be sent via secure email to insurance.clientservices@bmo.com or faxed directly to 1-866-716-8999.
- Select the complete Interest or Indexed Account name or Account code from the UL Investment Option List at www.bmoinvestpro.ca.
- Complete Section B for a one-time account transfer request.
- Complete Section D to change the allocation for future deposit.
- Account transfers received at Head Office by 2:00pm EST will be processed the same day. Account transfers received after 2:00pm EST will be processed effective the next business day.
- Transfers from a Guaranteed Interest Account (GIA) or Enhanced Market Indexed Account (EMIA) could result in Market Value Adjustment (MVA) charges.
- Use form [624E](#) for an additional deposit and future deposit allocation requests.

Side Account

- Available options are Market Indexed Accounts, Guaranteed Interest Accounts, Enhanced Market Indexed Accounts and Daily Interest Accounts.

Transfers to or from an existing Guaranteed Market Indexed Account (GMIA)

- Transfers to GMIA must be received at Head Office by 2:00pm EST, 4 business days prior to the Series Investment Date.
- Complete Section C for transfer **from** an existing GMIA series confirming whether you want the transfer processed immediately or on **the next Interest Crediting Date***.
- Transfers **from** an existing GMIA series on the next interest Crediting Date or (Maturity Date) must be received at Head Office by 2:00pm EST, 4 business days prior to **the next Interest Crediting Date* (or Maturity Date)**.
- *The **Next Interest Crediting Date (or Maturity Date)** must coincide with the 1st of the month following the date Head Office receives the transfer request. Refer to your latest Universal Life Statement for the next Interest Crediting Date on GMIA Series that you wish to transfer from.
- Indicate the Series Investment Date for each transfer from an existing GMIA. Refer to your latest UL Statement for the GMIA options and the Series Investment Date of the deposit to be transferred. For example – Canadian Equity GMIA (February 1, 2013).

Section A – Information about the policy

Policy Number:	
Policy Owner(s):	Policy Owner Phone No.:
Policy Owner Email Address:	
Agent Name:	Agent Phone No.:
Agent Email Address:	
Is a Power of Attorney/mandatory Limited Authority on file with BMO Life Assurance Company? <input type="checkbox"/> Yes <input type="checkbox"/> No	

Section E - Important Notes and Signatures

Note: Indexed Accounts credit an interest amount mirroring the percentage change in value of a specified underlying investment. Returns are calculated between consecutive valuation days. Returns may either be positive or negative and may be adjusted for currency fluctuations. A BMO Life Assurance Company (BMO Insurance) daily management fee will be subtracted each calendar day. The valuation day is any business day that the underlying investment is traded (or valued, as reasonably determined by BMO Insurance) and BMO Insurance Head Office is open. Policyowners do not purchase units or legal interest in the underlying investment.

I understand that a Guaranteed Market Indexed Account (GMIA) is a fixed term investment account that credits an interest amount linked to the performance of a specified Market Index. GMIA Credited Interest Rate Factors that determine the amount of interest credited to the Fund Value of the policy may change annually. Refer to GMIA Fact Sheets, available at www.bmoinvestpro.ca, for complete terms and conditions.

Province Signed	Date (DD/MMM/YYYY)	Signature
		Policy Owner (indicate title of signing officers, if applicable) or Power of Attorney X
		Policy Owner (indicate title of signing officers, if applicable) or Power of Attorney X