

ADDITIONAL DEPOSIT AND CHANGE IN 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 when you make an additional deposit on your policy.
- Complete Section C to change the allocation for future deposits.
- Additional deposits received at Head Office by 2:00pm EST will be processed the same day. Deposits received after 2:00pm EST will be processed effective the next valuation date nearest to the date the request was received at Head Office.
- Deposits to Guaranteed Market Indexed Account (GMIA) must be received at Head Office by 2:00pm EST, 4 business days prior to the Series Investment Date.
- Complete the Politically Exposed Questionnaire form [420E](#) for premium deposits of \$100,000.00 or more.
- Use form [174E](#) for one-time account transfer and future deposit allocation requests.

Side Account

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

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 B - Additional Deposit

The amount of the Deposit \$ _____ is to be allocated to the following:

Investment Option	Percentage (%) (must equal 100%)	Side Account Option	Percentage (%) (must equal 100%)

Section C - Future Deposit Allocations

Investment Option	Percentage (%) (must equal 100%)	Side Account Option	Percentage (%) (must equal 100%)

Section D - 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