

# Fund Deposit Payment Options

## (RRSP, TFSA and Non-Registered Policies)

To support various financial preferences and needs of our clients, BMO Insurance is proud to offer several convenient fund deposit payment options for BMO GIF policies. Your clients can choose from the **new** online banking payment option that offers deposits directly through their own financial institution, one-time or recurring pre-authorized debit (PAD) deposits, or traditional cheque deposits.



### 1. NEW Online Banking Payments

(Available for one-time deposits for existing policies only)

Clients can make payments using their financial institution's online banking service by following these steps:

- **Add a payee:** BMO Life Assurance Company
- **Enter the account number:** 899 + S + BMO GIF policy number (8 digits)  
»Example: 899S9012356
- Complete [Form 611 – BMO GIF Subsequent Transaction Form](#). Select the “**online payment**” option in section 2 and indicate the fund allocation for the online payment.
- Client signature is not required when a Limited Trading Authorization (LTA) is on file.



### 2. One-Time PAD Deposit

Clients may make a single deposit using a PAD:

- Complete [Form 611 – BMO GIF Subsequent Transaction Form](#).
- Ensure the PAD agreement section is signed by the payor. A signed agreement is required for each one-time request.
- Include a pre-printed personalized void cheque in the policyowner's name.



### 3. Recurring PAD Deposits

Clients can make regularly scheduled deposits through a recurring PAD:

- Complete Form [611 – BMO GIF Subsequent Transaction Form](#).
- **PAD run dates:** between 1<sup>st</sup> and 28<sup>th</sup> of the month
- **Frequency:** annual, semi-annual, quarterly, monthly, bi-weekly, or weekly.
- Ensure the PAD agreement section is signed by the payor. A signed agreement is required for each bank account to be used.
- Include a pre-printed personalized void cheque in the policyowner's name.



### 4. Cheque

Clients may also make one-time deposits by cheque:

- **Make the cheque payable to:**  
BMO Life Assurance Company
- **Mail the cheque to:**  
BMO GIF Administrative and Services Office,  
9-250 Yonge Street, Toronto, ON M5B 2L7
- Complete [Form 611 – BMO GIF Subsequent Transaction Form](#).



## Let's connect!

**BMO GIF**  
**Administrative &**  
**Services Office**

#### Mail

250 Yonge Street,  
9th Floor,  
Toronto, ON M5B 2L7

#### Phone

1-855-639-3867

#### Fax

1-855-747-5613

#### Email

[documents.bmolifegif@bmo.com](mailto:documents.bmolifegif@bmo.com)

*Email only available for TLS approved partners.  
Call your MGA back-office for more information.*



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BMO Life Assurance Company is the sole issuer and guarantor of the BMO GIF individual variable insurance contract. Please consult the Information Folder (including Policy Provisions & Fund Facts) for details of BMO GIF.

Insurer: BMO Life Assurance Company.

1110E (2026/03/01)