BMO Insurance

RESET PRINT

BMO Life Assurance Company
9-250 Yonge St, Toronto, ON M5B 2L7
Tel: 1-866-382-7401 • Fax: 1-866-716-8999
Email: Insurance.Annuities@bmo.com

Special Quote Request* Form for Defined Benefit RPP Funds

Pension Plan Sponsor (Employer/company)		Pension Jurisdiction	Unisex Portion (% or $)
Type of Annuity ☐ Single Life ☐ Joint Life	For Joint Life, please specify income reduction % on death of Primary Annuitant %		Guaranteed Period
Annuitant Name	Annuitant Date of Birth (dd/mmm/yyyy)		Annuitant Gender ☐ Female ☐ Male
Secondary Annuitant Name	Secondary Annuitant Date of Birth (dd/mmm/yyyy)		Secondary Annuitant Gender ☐ Female ☐ Male
Purchase Date (to be shown on contract) (dd/mmm/yyyy)	First Payment Date (dd/mmm/yyyy)		
Income Amount	Income Frequency	Indexing Percentage** %	
Submitted by (Advisor name)	Sales Region	Date submitted (dd/mmm/yyyy)	

Please email completed form to Insurance.Annuities@bmo.com

* Use a Special Quote Request Form to match pension terms such as purchase date or first payment date, when pension plan transfer will be completed after one or both of these dates. BMO Insurance reserves the right not to provide a quote.

**Please note that we do not offer indexing to CPI or temporary life annuities to accommodate bridge payments so quotes will not be provided.

Important: All special quotes will include a reasonable transfer period for the funds to be received by BMO Insurance. This is the date that premium must be received by us for the quote to be valid and will be provided with the quote.

Questions or need assistance? E-mail Insurance.Annuities@bmo.com