

Connect your accounts

It's easier to keep track of all your accounts when you connect your accounts to one user ID.

You won't need to memorize or search for your account numbers, and you'll be able to easily toggle between multiple accounts with just a single set of credentials.

Let's Connect
If you have questions
call **1-888-776-6886**.

How to set up your user ID

1. Sign in to any one of your [BMO InvestorLine](#) accounts.
2. Navigate to **Account Services** and select **Create User ID**.

The screenshot shows the 'Account Services' menu on the left. The 'Create User ID' option is highlighted with a red circle. A blue arrow points from the 'How to set up your user ID' section to this option. The main content area shows various account management tools and a list of accounts.

3. Create an alphanumeric user ID and set up a **password**.

The screenshot shows the 'Create User ID' form. The 'User ID' field is highlighted with a red circle. A blue arrow points from the 'How to set up your user ID' section to this field. The form also includes fields for 'Create a password' and 'Re-enter password', with a 'Check availability' button and a 'Save' button.

4. Link your accounts to your user ID.

The screenshot shows the 'Add account' form. The 'Add an account to this user ID' button is highlighted with a red circle. A blue arrow points from the 'How to set up your user ID' section to this button. The form includes a table with columns for 'Account', 'Nickname (optional)', 'Primary account', and 'Remove account'.

Add account

Enter the account number and password of the account that you want to add to this user ID.

Account number:
Account password: **Verify**

5. Make updates to your **two-step verification** preferences as necessary.

The screenshot shows the 'Two-step verification' form. The 'Phone number' field is highlighted with a red circle. A blue arrow points from the 'How to set up your user ID' section to this field. The form includes a table with columns for 'Phone number', 'Ext.', and 'Nickname (optional)', and a 'Verify' button.