

Submitting a Request for Funds and a Final Report

We have changed our process; please read below to learn more

BMO Bank of Montreal has engaged Telus Assyst Real Estate to exchange solicitor documents digitally.

What's new

The following products will now be processed electronically through Telus Assyst Real Estate:

- Conventional mortgages
- Homeowner Readiline (HRLC)
- Small Business Homeowner Readiline
- Switch mortgages for properties in Quebec.

If you are a **non-subscriber** to Telus Assyst Real Estate and processing above products, follow the instructions below to submit the request for funds, the final report and any other required documents:

STEPS	ACTION
To log in to the site:	Access our website using Internet Explorer at bmo.com/legaldocuments OR For Quebec only: notarius.com
	Enter the following User Name and Password (in lower case): User Name: legal Password: docs
	Select radio button for Mortgage Type. 'Conventional' or 'Collateral' (for Homeowner Readiline - HRLC) a) Select Province or Territory from drop down menu b) Select Product Type from drop down menu
To Request Funds:	Select RFF - Request for Funds NEW . Note: Complete all mandatory fields using Adobe . Please do not manually complete or modify the form. Navigate through each field to enter the required information. The information entered will generate the bar coded document allowing the information to be transmitted digitally. You must complete all mandatory fields before printing and faxing

The following information is provided on the Bank of Montreal coversheet sent to you along with our Preliminary Instructions:

- Solicitor ID:
- Reference #
- Mortgage Loan Number #
- Solicitor Trust Account Information: (Note: if BMO has no information please default to "None on file")
- Advance Amount: (FOR HOMEOWNER READILINE ONLY):
- Bank of Montreal Branch Address: Please indicate the Bank of Montreal address closest to you to avoid delays.

For **Homeowner Readiline of Credit only:**

If the advance amount is:	Select
Equal to the authorized limit	Option 1
Greater than \$0.01 and less than the full authorized limit	Option 2 (enter dollar amount)
Equal to \$0.01	Option 3

Final report

When submitting your Final Report:

1. Select Lawyer/Notary Report Bar-coded NEW
2. Using Adobe , navigate through each field to complete all mandatory information
3. A bar coded document will be generated
4. Print and fax the bar-coded document to 1-844-739-1152 (branches outside of Quebec) or 1-844-739-1151 (branches in Quebec). DO NOT use a coversheet.

DO NOT use a coversheet when you fax the request for funds or the final report.

Discard any previous copies of these documents that you may have printed or saved, as they are no longer valid.

Exclusion

Continue to address documents to the Bank directly by mail or Messenger for the following products: (For addresses, consult the Lawyers' / Notaries' instructions on the BMO Legal Portal).

- All refinance mortgage applications processed using a First Canadian Title [FCT] Instant Funding Program
- Progress draws
- Homeowner's Line of Credit (HOLC)
- Small Business Homeowner's Line of Credit
- Home Equity Loan
- Vacation Home Loan
- Mobile Home Loan
- Small Business Home Equity Loan
- Commercial mortgages, including the On Reserve Housing Loan program, Commercially Adjudicated Residential Mortgages (CARMs) and Multi Use Residential Mortgages (MURMs).

Thank you for your collaboration.

For more information on how to subscribe to Telus Assyst Real Estate, visit <http://www.AssystRealEstate.com>