



1. ACCOUNT TYPE - (FOR EXISTING ACCOUNTS ONLY)

- Non-Registered Account
Registered Retirement Savings Plan (RRSP)
Spousal or Common-Law RSP
Individual RESP
Family RESP
Registered Disability Savings Plan (RDSP)
Tax-Free Savings Account (TFSA)

2. INVESTOR INFORMATION

Account Holder/Annuitant/Subscriber Last Name
Account Holder/Annuitant/Subscriber First Name
Joint Account Holder/Subscriber Last Name (if applicable)
Joint Account Holder/Subscriber First Name
Corporation or Trust Name (if applicable)

3. BMO MUTUAL FUNDS DOLLAR COST AVERAGING (DCA)

The minimum initial investment in a BMO Money Market Fund, BMO Mortgage and Short Term Income Fund, BMO Core Plus Bond Fund, BMO Fixed Income ETF Portfolio or BMO Ultra Short-Term Bond ETF Fund is \$5000 and the minimum transfer amount to any one Fund each time is \$50. Under this program, you can arrange for transfer to a maximum of five other Funds of your choice and each Fund must be of the same currency and load.

From: FUND NAME FUND NUMBER
To: DCA DETAILS (N, A, C) FUND NAME (Must be the same currency and load) FUND NUMBER AMOUNT
1.
2.
3.
4.
5.

- Weekly Bi-Weekly Monthly Bi-Monthly Quarterly Semi-Annually Annually

Start Date (MANDATORY) End Date (if applicable)

Please note: 3 business days are required to set up or amend any systematic plans

4. SPECIAL INSTRUCTIONS

5. PLEASE READ CAREFULLY AND SIGN BELOW

- BMO Mutual Funds are offered by BMO Investments Inc., a financial services firm and separate legal entity from Bank of Montreal.
You have requested this application form and all other documents relating hereto to be in English. Vous avez exigé que ce formulaire et tous les documents y afférant soient rédigés en anglais.

Account Holder/Annuitant/Subscriber Signature
Joint Account Holder/Subscriber Signature (if applicable)
Representative Name (Please print)
Representative Signature
Dealer Representative Date