



Mutual Funds

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BMO Mutual Funds Dollar Cost Averaging (DCA) Form for existing accounts (Non-Registered/RRSP/RESP/RDSP/TFSA)

BMO Mutual Funds Account # MANDATORY

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) or, 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 or BMO Fixed Income ETF Portfolio is \$5000 and the minimum transfer amount to any one Fund each time is \$50.

From: FUND NAME, FUND NUMBER, To: DCA DETAILS, FUND NAME (Must be the same currency and load), FUND NUMBER, AMOUNT, Frequency: 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.

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