

# BMO Investment Trusts

You can use this form to authorise BMO to disclose details of your account to another person. Please complete Part 1 and ask the person you wish to be able to access details of your account to complete Part 2. They will be able to access details of your account by letter or telephone.

Please complete this form in block capitals and black ink.

Please return the form to:

**BMO Asset Management Limited**  
PO Box 11114  
Chelmsford  
CM99 2DG

21DLU/1  
06/21

## Part 1 Personal details (Please complete your details below)

Please ensure you supply all information requested below. Without the full information your account may be restricted - all fields marked with an \* are required.

Your account number	Date of birth*	Nationality*	National Insurance number*
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Title (Mr/Mrs/Miss/Ms/Other)*	First name(s) in full*	Surname*
<input type="text"/>	<input type="text"/>	<input type="text"/>

Permanent residential address\*

<input type="text"/>	<input type="text"/>	<input type="text"/>
	Postcode*	Country

Telephone	Email address
<input type="text"/>	<input type="text"/>

### Account holder signature

I authorise BMO to provide details on this account to the person named in Part 2 at their request.

<input type="text"/>	Date
	<input type="text"/>

## Part 2 Additional contact details

Title (Mr/Mrs/Miss/Ms/Other)*	First name(s) in full*	Surname*
<input type="text"/>	<input type="text"/>	<input type="text"/>

Permanent residential address\*

<input type="text"/>	<input type="text"/>	<input type="text"/>
	Postcode*	Country

Telephone	Email address
<input type="text"/>	<input type="text"/>

Date of birth*	Nationality*	National Insurance number*
<input type="text"/>	<input type="text"/>	<input type="text"/>

### Additional contact signature

I agree to BMO holding my personal details for the operation of this account only.

I understand access to the account is subject to the Plan Terms and Conditions and that I am not able to give any instructions on this account.

<input type="text"/>	Date
	<input type="text"/>

### Data Protection

All personal information submitted with this application form will be treated in accordance with BMO Asset Management Limited's Privacy Policy, which is available at: [bmoinvestments.co.uk/privacy-policy](http://bmoinvestments.co.uk/privacy-policy). This privacy policy includes full details about the type of information we collect, what we use this information for, and your related rights.

In addition, the Key Features and Terms & Conditions document for the selected account contains a summary of the key information about how we process your personal information. Should you have any questions regarding how we process your personal information key contact information can be found both in the Privacy Policy and the Terms & Conditions document.

### Marketing

We would like to provide you with details of financial services and products that we offer which we think you might find interesting. **If you would NOT like to receive such information, please tick this box** . If at any time you change your mind, please let us know by emailing us at [preferences@bmogam.com](mailto:preferences@bmogam.com).





**BMO Asset Management Limited**

0345 600 3030, 9:00am – 5:00pm, weekdays, calls may be recorded or monitored for training and quality purposes.

BMO Asset Management Limited is authorised and regulated by the Financial Conduct Authority and is a member of BMO Global Asset Management EMEA of which the ultimate parent company is the Bank of Montreal. L27\_06/21