BMO Insurance

BMO Life Assurance Company
60 Yonge Street, Toronto, ON M5E 1H5
1-866-716-8999 • 416-350-6611 Fax

ACCOUNT TRANSFER AND CHANGE IN FUTURE DEPOSIT ALLOCATION

Instructions:

1. Select the complete Interest or Indexed Account name and/or Account code from the UL Investment Option List at www.bmoinvestpro.ca
2. **Only Market Indexed Accounts, Guaranteed Interest Accounts and Daily Interest Accounts are available in the Side Account.**
3. Account Transfers can be faxed directly to BMO Life Assurance Company, Client Services Department at **1-866-716-8999 or 416-350-6611.**
4. Requests for account transfers received at Head Office by 2:00 pm EST will be processed the same day. Requests for account transfers received after 2:00 pm EST will be processed effective the next valuation date nearest to the date the account transfer request is received at Head Office.
5. Requests to **transfers to** Guaranteed Marked Indexed Accounts must be received at Head Office by 2:00 pm EST, 4 business days prior to the Series Investment Date.
6. You must indicate the Series Investment Date for each transfer from an existing GMIA. Please refer to your latest UL Statement for the GMIA option and the Series Investment Date of the deposit to be transferred. For example - Canadian Equity GMIA (February 1, 2013).
7. Requests to **transfer from** an existing GMIA Series on the **next Interest Crediting Date (or Maturity Date)** must be received at Head Office by 2:00 pm EST, 4 business days prior to the next Interest Crediting Date (or Maturity Date). You must also indicate in one of the check boxes (Section B) whether you want the transfer processed immediately or on the **next Interest Crediting Date***
   ***Next Interest Crediting Date** (or Maturity Date) must coincide with the 1st of the month following the date we receive the transfer request. Refer to your latest Universal Life Statement for the next Interest Crediting Date on GMIA Series that you wish to transfer from.
8. Complete the Additional Deposit and Change in Future Deposit Allocation Form (624E) for additional deposit requests.

Policy Number:	Policyowner(s):	Policyowner Phone No.: (000) 000-0000
	Agent Name:	Agent Phone No.: (000) 000-0000

A) ACCOUNT TRANSFER

FROM: Investment Option	Amount "$", "%", or "Full Balance"	TO: Investment Option	Amount "$", "%", or "Full Balance"
FROM: Side Account Option	**Amount "$", "%", or "Full Balance"**	**TO: Side Account Option**	**Amount "$", "%", or "Full Balance"**

B) FOR TRANSFERS FROM GUARANTEED MARKET INDEXED ACCOUNTS – PLEASE CHECK ONE OF THE FOLLOWING:

☐ Transfer to be processed from the Guaranteed Market Indexed Account, **immediately**, starting with the GMIA Series closest to Maturity; OR

☐ Transfer to be processed from an existing GMIA Series **on the next Interest Crediting Date**.

(Note: For GMIAs an Early Redemption Fee may apply on transfer made before the Maturity Date. Please refer to GMIA Fact Sheets, available at www.bmoinvestpro.ca, for complete terms and conditions)

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C) FUTURE DEPOSIT ALLOCATIONS

Investment Option	Percentage (%) (must equal 100%)	Side Account Option	Percentage (%) (must equal 100%)

Is a Power of Attorney/mandatory Limited Authority on file with BMO Life Assurance Company? ☐ Yes ☐ No

Note: Indexed Accounts credit an interest amount mirroring the percentage change in value of a specified underlying investment. Returns are calculated between consecutive valuation days. Returns may either be positive or negative and may be adjusted for currency fluctuations. A BMO Life Assurance Company (BMO Insurance) daily management fee will be subtracted each calendar day. The valuation day is any business day that the underlying investment is traded (or valued, as reasonably determined by BMO Insurance) and BMO Insurance Head Office is open. Policyowners do not purchase units or legal interest in the underlying investment.

I understand that a Guaranteed Market Indexed Account (GMIA) is a fixed term investment account that credits an interest amount linked to the performance of a specified Market Index. GMIA Credited Interest Rate Factors that determine the amount of interest credited to the Fund Value of the policy may change annually. Refer to GMIA Fact Sheets, available at www.bmoinvestpro.ca, for complete terms and conditions.

X _____ _____

Signature of Policyowner #1 (title if applicable) or Power of Attorney — Date (dd/mmm/yyyy)

X _____ _____

Signature of Policyowner #2 (title if applicable) or Power of Attorney — Date (dd/mmm/yyyy)