

Branch Transit No.   
 Branch Domicile Stamp

P E R S O N A L I N F O R M A T I O N

Mr. Mrs. Miss. Ms. Dr.

Applicant's Last Name  Initial  Applicant's First Name

Applicant's Address  Apt. Number  City

Province  Postal Code  Area Code  Telephone Number  -  Area Code  Telephone Number (other)  -  Language Preference  English  French

Y O U R M A I N A C C O U N T

What is the transit and account number of the Canadian dollar Deposit account you wish to use as the Main account for your BMO Account Tracker?

Transit No.  Main Account Number  (cheque return is only available on the Main account)

O T H E R A C C O U N T S T O B E T R A C K E D

Transit No.	Account Number	Type of Account*	Account Owner (if different from Applicant)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

\* Includes Everyday Banking Deposit accounts, all Registered and Non-registered Term Investments (IPS/MECH), Mutual Funds, RRFs and RESPs, but does not include BMO InvestorLine and BMO Nesbitt Burns accounts.

P E R S O N A L L O A N B A L A N C E S T O B E T R A C K E D (PLPs and Demand Loans)

Transit No.	Account Number	Type of Account (PLP or Demand Loan)	Account Owner (if different from Applicant)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Y O U R C O N T A C T A T T H E B R A N C H

Financial Services Manager's Name  Area Code  Telephone Number  -  Area Code  Fax Number  -

Branch Transit No.  Branch Address/Location

P L E A S E R E A D C A R E F U L L Y A N D S I G N B E L O W

- By signing below, the owner(s) of the account(s) listed on this BMO Account Tracker Application authorize(s) the applicant to view transaction information on his/her/their account(s). This does not authorize the applicant to transact on the account(s) unless authorization is provided otherwise.
- I/We acknowledge that cheque return is only available for the Main account selected above, and that the BMO Account Tracker statement replaces all other statements I/we currently receive for the accounts listed on this application.
- I/We acknowledge that the Bank may specify, from time to time, a minimum "Investment Balance" required to qualify for the BMO Account Tracker. "Investment Balance" means the balances of your Bank of Montreal mutual fund and term investment accounts at the end of each month. Your BMO Account Tracker may be cancelled by the Bank if your Investment Balance goes below the required minimum.
- I/We acknowledge having received, read and understood the Privacy Disclosure & Consent on the reverse of this application.

Applicant's Name <input type="text"/>	Other Account Owner #1 Name <input type="text"/>	Other Account Owner #2 Name <input type="text"/>	Other Account Owner #3 Name <input type="text"/>
Applicant's Signature <input type="text"/>	Other Account Owner #1 Signature <input type="text"/>	Other Account Owner #2 Signature <input type="text"/>	Other Account Owner #3 Signature <input type="text"/>
Date <input type="text"/>	Date <input type="text"/>	Date <input type="text"/>	Date <input type="text"/>

## Y O U R   P E R S O N A L   I N F O R M A T I O N

### **What is Personal Information?**

Personal information is information that identifies you as an individual. It includes not only your name and address, age and gender, but also your personal financial records, identification numbers including your social insurance number (SIN), personal references and employment records.

### **Why Does the Bank Ask You For Your Personal Information?**

There are some purposes for using your personal information which are self-evident, such as asking for information concerning your credit history to help determine your credit worthiness if you are applying for a loan or mortgage. Self-evident purposes should be clear, but if you have any questions, just ask us. In addition to those purposes which are self-evident, we ask you for your personal information for the following purposes:

- ▶ to understand your needs,
- ▶ to determine the suitability of our products and services for you,
- ▶ to determine your eligibility for our products and services,
- ▶ to provide you with information and offers on our products and services, or those of others, that we believe may be of interest to you, and
- ▶ to comply with the law.

### **Sharing Your Personal Information**

Your personal information is shared, to the extent permitted by law, within the Bank of Montreal Group of Companies (that is, the Bank and its subsidiaries and affiliates) which provide deposit, loan, investment, securities, brokerage, insurance, trust and other products and services. With this more comprehensive understanding, we are better able to meet your needs as they grow and change.

### **Your Choices**

If you would prefer not to receive our direct marketing service and/or not have your personal information shared, you can have your name deleted from our direct marketing and/or shared information lists. All you have to do is ask us for the necessary form(s). Please note that you cannot opt out of sharing your personal information where you have requested a product or service which is jointly offered by us and a member of the Bank of Montreal Group of Companies.

Also, if you would prefer not to have us use your SIN for administrative purposes, just ask us for the necessary form. This option does not apply where we are required to use your SIN for income tax reporting purposes.

For complete details on our commitment to privacy, please refer to our Privacy Code.