

Your TFSA Checklist

Make sure your TFSA is working hard for you.

Some things to think about to get the most out of your TFSA.

- | Yes | No | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Have you maximized your 2009 contribution?
You can contribute up to \$5,000 in 2009. |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you ready to make your 2010 contribution?
You can contribute \$5,000 in 2010, plus the amount of any unused contribution room or withdrawals from 2009. |
| <input type="checkbox"/> | <input type="checkbox"/> | Does your TFSA contain the investments that best meet your specific goals?
You can hold a variety of investments in a TFSA (e.g., cash, GICs, mutual funds, bonds, stocks and more). |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you know how your TFSA works with the rest of your finances?
Your TFSA can enhance your overall financial plan and help you with your short and long-term goals. |

If you answered “no” to any of these questions, please speak with one of our BMO® investment professionals today. Together, you can explore all of the options you have available and ensure you are maximizing your tax savings – based on your individual needs and goals.

Talk to a BMO investment professional today. Call 1-800-665-7700 or visit your local branch.