

## ADDITIONAL DEPOSIT 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](http://www.bmoinvestpro.ca)
2. **Only Market Indexed Accounts, Guaranteed Interest Accounts and Daily Interest Accounts are available in the Side Account.**
3. Premium deposits and allocation change requests received at Head Office by 2:00 pm EST will be processed the same day. Requests received after 2:00 pm EST will be processed effective the next valuation date nearest to the date the request is received at Head Office.
4. Requests for **deposits 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.
5. Complete the Account Transfer and Change in Future Deposit Allocation Form (174E) for Account Transfer requests.
6. Complete the Politically Exposed Persons Questionnaire for a lump sum premium payment of \$100,000.00 or more.

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

**A) ADDITIONAL PREMIUM DEPOSITS** – Complete this section if you would like to make an additional deposit on your policy.

Please indicate the amount of the Deposit: \$ \_\_\_\_\_

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

**B) FUTURE DEPOSIT ALLOCATIONS** – Complete this section if you would like to change the investment account allocation for any future premium deposits.

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](http://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)