

**PLEASE COMPLETE ALL SECTIONS**

**MATERIAL CHANGE FORM**

**PLEASE PRINT CLEARLY**

Account # 1:  Transaction #

Related Accounts #2  #3  #4

Title  Last Name  First Name  Initials

Home Address - Number / Street  Suite No.

City/Town  Province  Postal Code

Marital Status  Home Phone  Business Phone

Pro\*  BMO Staff

**ABOUT YOUR BUSINESS**

Occupation  Employer name

Type of Business

Job Description

1. Are you, or someone you live with an insider, a senior officer or director of a company whose shares are traded on an exchange quotation system or in over-the-counter (OTC) markets?  
 Yes  No  Company Name(s)

2. Do you, or someone you live with, individually or as part of a group, control a public company?  
 Yes  No  If yes % Company Name

3. Do you have authority over any other accounts at BMOIL? Account #'s

**SPOUSE**

or common-law partner information

Please omit this section if the Applicant's spouse or common-law partner is the Co-applicant. Co-applicants must complete their own material change form if their information has changed.

Title  Last Name  First Name

Occupation  Employer Name

Type of Business

Pro\*  BMO Staff

\* You are considered to be Pro if you, or someone you live with, is employed with an IIROC member firm or related company. Please provide a letter of confirmation from the member firm's Compliance department authorizing this account(s).

**ACCOUNT CHARACTERISTIC(S)**

Please round to the nearest dollar.

Annual Income from all sources

**Net Liquid Assets (A)**  
 (Cash & Securities less loans outstanding against securities)

**Net Fixed Assets (B)**  
 (Fixed assets less liabilities outstanding against fixed assets)

**Estimated Net Worth (C)**  
 (C= A + B)

Source of Funds  Intended use of the Account

**SIGNATURES**

I certify that: the information on this form is true and complete; the information on this form shall supersede information previously provided; and the terms and conditions of my Client Account Agreement remain in effect.

Client Signature  Date

YYYY / MM / DD