

Additional Authorized Trading Officer Information

A

TELL US ABOUT the authorized trading officer

BMO InvestorLine Account Number:

If some other person will have authority over, or financial interest, in this account, please complete the following information. This includes Authorized Trading Officers, sole owners, partners, executors and trustees. **There is a maximum of two Authorized Trading Officers per account.** Please contact BMO InvestorLine or visit our web site for additional forms.

Preferred Language: <input type="checkbox"/> English <input type="checkbox"/> French		Citizenship		Country of Residence	
Account Characteristic(s): You are completing this form as:		<input type="checkbox"/> Pro* <input type="checkbox"/> Authorized Trading Officer <input type="checkbox"/> Sole Owner		<input type="checkbox"/> BMO Staff <input type="checkbox"/> Beneficial Owner (own greater than 10% interest, directly or indirectly in the account)	
Title	Last Name	First Name		Int.	
Home Address (number, street)				Suite No.	
City or Town		Prov.		Postal Code	
Home Phone (area code, no.)			Business Phone (area code, no., ext.)		
Fax No.		Other Daytime Phone		Email	
Mailing Address if different from above				Suite No.	
City or Town		Prov.		Postal Code	
Marital Status		No. of Dependants	Date of Birth (YY/MM/DD)		Occupation
SIN		<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"/>		Employer Name	
Type of Business			Job Description		

B

FINANCIAL information

Bank Name	
Transit Number	Account Number
Bank Address	
Address Continued	

C

FOR OPTIONS account applications

- Number of years trading in options:
- How would you describe your options trading knowledge?: Expert Knowledgeable Limited None
- Experience with: None Long Calls or Puts Covered Naked Spreads

I have received the Risk Disclosure Statement for Futures and Options (Section Three, Part G of the Client Agreements booklet). I understand the special risks pertaining to trading in options and that BMO InvestorLine Inc. is not registered to trade in futures. I declare that I have adequate financial resources to sustain any such transaction in which I participate.

Additional Authorized Trading Officer's Signature _____ **Date (YY/MM/DD)** _____

D

PLEASE PROVIDE DETAILS
if you answer YES to the following questions

- Are you, or someone you live with, 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 Company Name(s): _____
 No
- Do you, or someone you live with, individually or as part of a group own 10% or more of a public company?
 Yes Company Name: _____
 No
- Do you have, or exercise authority over, any brokerage accounts with other financial institutions?
 Yes Financial Institution(s): _____
 No Account Type: _____ Account Type: _____
- Do you have, or exercise authority over, any accounts with BMO InvestorLine?
 Yes Account #1: _____ Account #2: _____
 No

F

NOW TELL US
about your spouse or common-law partner

Please omit this section if your spouse or common-law partner is an Authorized Trading Officer.

Title	Last Name	First Name	Int.
Occupation	Employer Name		
Type of Business	Job Description		

F

SIGNATURE

By requesting the opening of either a cash investment account, or an account granted margin facility, I certify that the information in this application is true and complete and I have received and agree to the terms and conditions as outlined in the Client Agreements booklet. I also agree to advise you immediately in writing of any material change in information.

Additional Authorized Trading Officer's Signature _____ Date (YY/MM/DD) _____

Please provide a photocopy of 2 pieces of ID, one of which must be a photo ID. If you have a BMO InvestorLine account and/or a BMO Bank of Montreal account, please write you SIN and account number(s) on the photocopy. If you do not have a BMO InvestorLine account or a BMO Bank of Montreal account, present your 2 pieces of ID, in person, at a BMO InvestorLine office or a BMO Bank of Montreal branch.

OFFICE
use only

BRANCH INFORMATION

I have verified all and included photocopies of two pieces of ID, one of which is a valid photo ID.
Name of Branch Representative (please print) _____

Phone (include area code, no., and ext.) _____

EIN #

Branch Stamp

*You are considered to be a 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 you to be the Authorized Trading Officer for this account.
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