

Name		Date of Birth (DD/MM/YYYY)		Social Insurance No. (Optional)	
Street Address			City	Province	Postal Code
Home Phone No.	Residence <input type="checkbox"/> Own <input type="checkbox"/> Rent <input type="checkbox"/> Other			How long at present address? Years Months	
Occupation		Currently Employed by (Inc. Address)		How long with employer? Years Months	
Employer's Phone No.	<input type="checkbox"/> Married <input type="checkbox"/> Unmarried (This includes single, divorced and widowed) <input type="checkbox"/> Separated			Number of dependents	
Your Principal financial institution & address				Account No.	

PERSONAL DATA ON YOUR SPOUSE		Under the laws of Canada or the provinces your spouse may have a legal interest in your assets		Note: If this section is completed, your spouse must sign in the space provided on the bottom of page 2.
Spouse's Name	Date of Birth (DD/MM/YYYY)	Social Insurance No.	Spouse's Occupation	
Spouse currently employed by (Inc. address)		How long with employer? Years Months		Spouse's work phone no.

FINANCIAL INFORMATION				AS AT	Date (DD/MM/YYYY)
ASSETS			LIABILITIES		
List and describe all assets			List credit cards, open lines of credit, and other liabilities (including alimony and child support)		
		VALUE		BALANCE OWING	MONTHLY PAYMENT
Total Chequing Balances		\$	Bank Loans	\$	\$
Total Savings Balances			Mortgages on Real Estate Owned		
Life Insurance Cash Value			*See Schedule B on page 2		
Automobile Make	Model	Year			
Stocks & Bonds (see Schedule A on page 2)			Monthly Rent Payment		
Accounts / Notes Receivable (Please itemize)			Credit Cards (Please Itemize)		
Real Estate Owned (see Schedule B on page 2)					
Retirement Account (e.g. : RRSP)			Other Obligations (Please Itemize)		
Other Assets (Household Goods, etc.)					
			TOTAL MONTHLY PAYMENTS		\$
			TOTAL LIABILITIES (II)	\$	
TOTAL ASSETS (I)		\$	NET WORTH (I - II)	\$	

INCOME SOURCES		SUNDRY PERSONAL OBLIGATIONS	
Your Gross Monthly Salary		\$	Please provide details below if you answer Yes to the following question. Are you providing your personal support for obligations not listed above (i.e., cosigner, endorser, guarantor)? <input type="checkbox"/> Yes <input type="checkbox"/> No Details of any of the above
Spouse's Gross Monthly Salary			
Net Monthly Rental (from Schedule B on page 2)			
Other Income (Please itemize)			
TOTAL		\$	

SCHEDULE A STOCKS AND BONDS						
Quantity	Description	Where Quoted	Market Value	Pledged as Collateral		
				Yes	No	
			\$			
TOTAL			\$			

SCHEDULE B		REAL ESTATE OWNED						Please provide information on your share of real estate owned					
PROPERTY ADDRESS (Primary residence)		Type of Property	Present Market Value	Amount of Mortgage Liens	Gross Monthly Rental Income	Monthly Mortgage Payments	Monthly Taxes insur. Misc and Maintenance	Net Monthly Rental Income					
Plan No.:	Lot No.:												
Street													
City	Province		\$	1st \$ 2nd \$	\$	1st \$ 2nd \$	\$ \$	\$					
NAME AND ADDRESS OF MORTGAGE HOLDER(S)		First Mortgage		Maturity Date	Second Mortgage			Maturity Date					
REGISTERD OWNER(S) % Owned		Month /Year Aquired			Purchase Price \$								

PROPERTY ADDRESS (Other property)		Type of Property	Present Market Value	Amount of Mortgage Liens	Gross Monthly Rental Income	Monthly Mortgage Payments	Monthly Taxes insur. Misc and Maintenance	Net Monthly Rental Income
Plan No.:	Lot No.:							
Street								
City : Province :			\$	\$ 1st \$ 2nd \$	\$	\$ 1st \$ 2nd \$	\$	\$
NAME AND ADDRESS OF MORTGAGE HOLDER(S)		First Mortgage		Maturity Date	Second Mortgage			Maturity Date
REGISTERD OWNER(S)	% Owned	Month /Year Acquired			Purchase Price \$			

GENERAL INFORMATION				Please provide details if you answer Yes to any of the following questions.				
Have you ever had an asset repossessed?		<input type="checkbox"/> Yes <input type="checkbox"/> No		Have you ever declared bankruptcy?		<input type="checkbox"/> Yes <input type="checkbox"/> No		Date (DD/MM/YYYY)
Are you party to any claims or lawsuits?		<input type="checkbox"/> Yes <input type="checkbox"/> No		Do you owe any taxes prior to the current year?		<input type="checkbox"/> Yes <input type="checkbox"/> No		
Details:								

Privacy Disclosure and Consent

Your Personal Information

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. We also ask you for your personal information for the following purposes:

- to verify your identity and protect against fraud,
- to understand your financial service requirements,
- to determine the suitability of products and services for you,
- to determine your eligibility for certain of our products and services, or those of others, and offer them to you,
- to set up and manage products and services you have requested, and
- to comply with laws and securities regulations.

Sharing Your Personal Information

Your personal information is shared, to the extent permitted by law, within BMO® Financial Group (that is the Bank and its subsidiaries and affiliates) which provides 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 with a member of BMO Financial Group, you can have your name deleted from our direct marketing and/or shared information lists. All you have to do is ask us. 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 another member of BMO Financial Group.

Also, if you would prefer not to have us use your SIN for administrative purposes, just ask us. 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 respect and protect the privacy and confidentiality of personal information of individuals, please refer to our Privacy code, which is available at any branch of the Bank of Montreal, by visiting our website at www.bmo.com/privacy/ or by calling 1-800-363-9992.

Please read and sign below:

In this agreement, “you” means each person who signs below.

You consent to Bank of Montreal (the “Bank”) obtaining credit information and other financially-related information about you at any time from your employer(s), any credit bureau, any registry, any person who has or may have financial dealings with you and any references that you have provided to the Bank. The Bank may disclose such information about you to any credit bureau, and any person who has or may have financial dealings with you. If there is more than one party to the loan(s) or guarantee which this agreement relates to, the Bank may choose whose information it will disclose to the credit bureau. The Bank will not obtain such information after the loan(s) or guarantee which this agreement relates to has been terminated, but may continue to disclose such information in order to maintain the integrity of the credit bureau system and credit granting process.

You certify that all information you give to us in this agreement is true, correct and complete.

You confirm having read the terms and conditions above and agree to be bound by them.

Date (DD/MM/YYYY)	Signature	Spouse’s Signature
	X	X

PERSONAL BANKING SERVICES		
If you would like more information, please tick the appropriate box(es)		
<input type="checkbox"/> Chequing Accounts	<input type="checkbox"/> MasterCard Card	<input type="checkbox"/> Registered Retirement Savings Plans
<input type="checkbox"/> Savings Account	<input type="checkbox"/> Term Investments	<input type="checkbox"/> Other :
<input type="checkbox"/> Personal Loans	<input type="checkbox"/> Residential Mortgages	