

Welcome to BMO InvestorLine

RRIF PAYMENT INFORMATION AND ELECTION TO USE SPOUSE'S OR COMMON-LAW PARTNER'S AGE

**A TELL US ABOUT YOURSELF**

Title  Last Name  First Name  Init.

SIN (required by the Canada Customs and Revenue Agency)

BMO InvestorLine Account Number

**B ELECTION TO USE SPOUSE'S OR COMMON-LAW PARTNER'S AGE**

To be completed only if spouse or common-law partner is younger than Planholder and Planholder wishes to use spouse's or common-law partner's age to determine the amount of payments. Pursuant to Section Two, Part B of the Client Agreements booklet applicable to RIFs (Registered Retirement Income Fund), I hereby elect to use the age of my spouse or common-law partner (full name).

Title  Last Name  First Name  Init.

To determine the periodic payments under the RIF, I hereby certify my spouse's or common-law partner's birthdate to be  I understand that this election may not be changed after my first payment even if my spouse or common-law partner dies, or we separate.

**C TYPE OF PAYMENT**

Minimum  Client Selected Amount \$   Gross  Net

**D FREQUENCY OF PAYMENTS**

Please arrange to have my self-directed RIF payments forwarded to me as follows:

Monthly  Quarterly  Semi-annually  Once annually in the month of

Payments from your account are not required the first year.

**E PAYMENT DATE**

Payment to commence:

on the 10th of the month, or  on the 24th of the month.

Please be aware that payments to your account could occur before or after the selected date.

**F PAYMENT OPTIONS**

Please attach a void cheque to ensure accuracy.

Bank Name  Bank Address

Transit Number  Institution Number  Account Number

OR

Please deposit into my BMO InvestorLine account

Planholder's Signature  Date

**G DESIGNATION OF SUCCESSOR PLANHOLDER (RIF ONLY) For all provinces and territories except Quebec\***

In respect of this Retirement Income Fund and pursuant to the provisions of the Income Tax Act (Canada) and Section Two, Part B, paragraph 5 of the Client Agreements booklet of the RIF, I hereby designate my spouse or common-law partner as successor planholder of the RIF in the event of my death. I reserve the right to change this designation, by notice in writing delivered to BMO InvestorLine.

Name of Spouse or Common-law partner

Spouse's or Common-law partner's SIN (required by the Canada Customs and Revenue Agency)

Planholder's Signature  Date

\*For QUEBEC: Where the law of Quebec applies, a designation of successor annuitant and/or beneficiary(ies) made on this form cannot be given effect. Effect can only be given to a designation made in a Will or other written document that meets the requirements of a testamentary disposition under the law of Quebec.