

PRODUCT  
INFORMATION

CLIENT  
MATERIAL

POINT OF SALE  
MATERIAL

CLIENT  
VIDEOS

APPLICATIONS  
&  
ADMINISTRATION

FACT FINDERS  
& PLANNING  
DOCUMENTS

**BMO GUARANTEED INVESTMENT FUNDS**  
DIGITAL BRIEFCASE FOR ADVISORS

BMO  Insurance

892E (2020/06/30)

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Product Overview (607E)

Advisor Guide (594E)

Introducing BMO GIF (851E)

Key Features and Markets (785E)

All-in-one Investment Solutions (789E)

BMO GIF 75/100 Plus (869E)



For more material, visit [bmoinsurance.com/advisor/gif](https://bmoinsurance.com/advisor/gif)

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To help you worry less and live more.

BMO Insurance  
We're here to help.

BMO Guaranteed Investment Funds

Client Guide (595E)

Understanding the Probate Process

1. Lack of Plan  
- Probate is a costly process  
- Can involve the risk of a costly challenge from family or creditors

2. Family and Financial Information  
- Understanding and paying other obligations such as taxes and mortgages is key  
- Prepared for other questions, probate fees and potential beneficiaries

3. Inventory and Paying Other Obligations  
- Inventory of assets and liabilities is required  
- Creditors must be notified and debts paid

4. Distribution  
- How beneficiaries inherit depends on will or intestacy laws  
- Beneficiaries should understand responsibilities, will have payable form

BMO Insurance  
We're here to help.

Understanding the Probate Process

BMO Guaranteed Investment Funds

To help you worry less and live more.

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Lead Consumer Brochure (596E)

BMO Insurance

BMO Guaranteed Investment Funds

Helping you reach your retirement goal sooner.

BMO Insurance  
We're here to help.

Monthly Savings Brochure (599E)

Are segregated funds right for you?

BMO Guaranteed Investment Funds

The key differences

Segregated funds are well suited for:

Benefits include:

Guarantees on your principal

Leading in market gains

Ripens potential

Creditor protection

BMO Insurance  
We're here to help.

Are Segregated Funds Right For You? (598E)

Guaranteed Investment Fund Taxation Basics

BMO Insurance

Annual income obligations

Adjusted Cost Base (ACB)

Guarantee tip

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BMO GIF Taxation Basics (820E)



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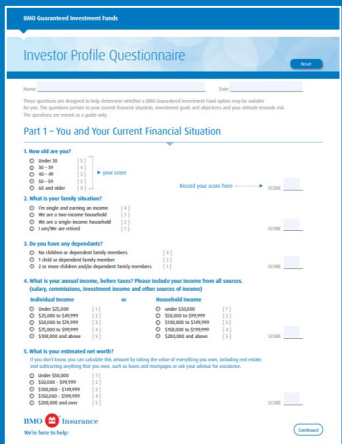
**FACT FINDERS & PLANNING DOCUMENTS**



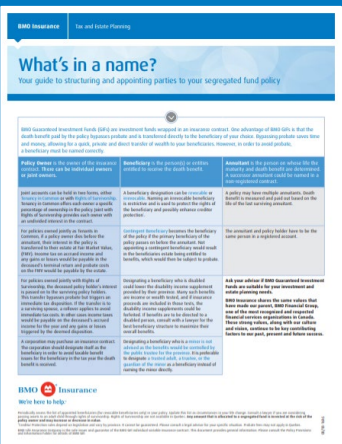
Information Folder and Policy Provisions (602E)



Fund Facts (773E)



Investor Profile Questionnaire (615E)



Appointing Parties to Your Segregated Funds Policy



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[BMO GIF Overview](#)



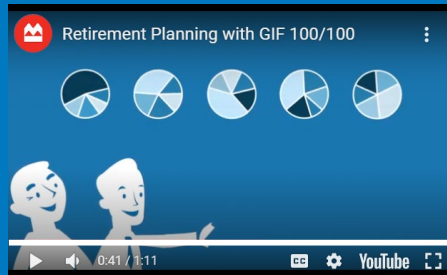
[Introducing BMO GIF](#)



[Protect Your Savings with BMO GIF 100/100](#)



[BMO GIF Leave More for Your Loved Ones](#)



[Retirement Planning with GIF 100/100](#)



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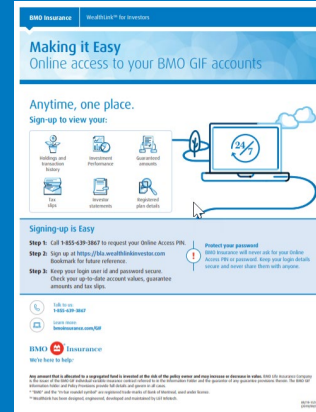
**BMO GIF  
Application Form  
(592E)**



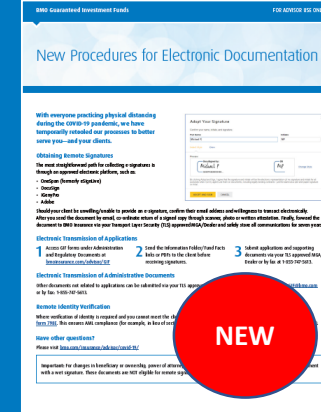
**BMO GIF Nominee  
Application Form  
(589E)**



**BMO GIF  
TFSA Application  
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**WealthLink for  
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**New Procedures  
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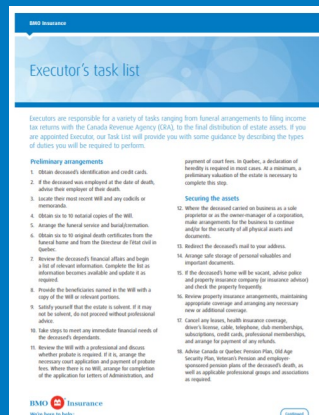
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Reason Why Letter (817E)



BMO GIF Investment Objectives and Strategies (743E)



Executor Task List (847E)



Estate Planning Fact Finder (846E)



Business Owner Fact Finder (848E)



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