

# BluePrint Program<sup>®</sup>

## Giving you Access to the 'Best of BMO' Investment Thinking

The BMO Nesbitt Burns BluePrint Program is a professionally managed investment solution providing access to the *Best of BMO* investment thinking. Aligning to your client's specific investment goals, preferences and tolerance for risk, the BluePrint Program provides an elite range of portfolios that are managed entirely by BMO Global Asset Management and BMO Capital Market's highly experienced teams of investment professionals.

### Professionally Managed

As an individually managed portfolio, all the day-to-day decisions as to what to buy and sell are made by professional money managers who have the expertise and knowledge required to execute sound and objective decisions on your behalf.

### Expertise and Knowledge

The Program is predicated on a close working relationship with your Investment Advisor who will help you determine which BluePrint portfolio best suits your investment objectives and risk tolerance.

### Customized Approach to Investing

All portfolios in the BluePrint Program are individually managed and are customized to meet your needs, and, as such, are designed to take into account any special circumstances and/or relevant tax issues that apply to your situation.

### Comprehensive Reporting

Every quarter you will receive a comprehensive personalized Quarterly Review, which includes a detailed performance analysis, portfolio summary, and insightful manager commentary. In addition, you will receive your BMO Nesbitt Burns Statement of Account each month detailing your portfolio holdings.

At the end of the year, you will also receive an Annual Portfolio Summary - providing a breakdown of deposits and withdrawals, realized capital gains and losses, and a summary of portfolio transactions.

### All-Inclusive Fee

A single quarterly or monthly fee covers all professional portfolio management services, and transaction costs as well as security custody, administration and reporting services. A portion of this fee may be deductible for tax purposes but clients should seek independent advice on all tax matters.

With this all-inclusive fee, you continue to benefit from the high level of service provided by your Investment Advisor.

**Contact your BMO Nesbitt Burns Investment Advisor for more information about BluePrint and get the Best of BMO investment thinking working for you. Visit [www.bmo.com/nesbittburns](http://www.bmo.com/nesbittburns) for more information about the products and services available through BMO Nesbitt Burns.**



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