

Architect Program®

The only investment program you may ever need



Welcome to one of the most efficient and effective investment solutions available today. The BMO Nesbitt Burns Architect Program® (Architect Program) is the next evolution in unified managed accounts, offering you:

- The flexibility to invest in separately managed accounts, mutual funds, exchange traded funds, alternative investments and other eligible managed and non-managed investment vehicles – all within one account.
- Active coordination of the underlying investment vehicles in the managed portion of the account for systematic portfolio rebalancing, intelligent cash management and effective tax management.
- One account, one fee, one set of documents and one comprehensive statement.

Proven Investment Approach

As an Architect Program client you will benefit from your BMO Nesbitt Burns Investment Advisor's expertise and guidance combined with BMO Nesbitt Burns' proven processes.

- Develop a personal plan for success based on your Investment Policy Statement.
- Lay the foundation of your asset mix strategy.
- Construct your optimal portfolio: a custom portfolio of specialist managers and other investment vehicles.
- Benefit from active monitoring and maintenance: a team of experienced professionals working for you. Together with your trusted Investment Advisor, you monitor the non-managed portion of your portfolio while the managed portion of the portfolio receives daily attention from the overlay portfolio manager, putting the Architect Program in a class of its own.

A Tradition of Leadership and Innovation

The first of its kind in Canada, the industry-leading BMO Nesbitt Burns Architect Program is the next evolution in unified managed accounts and combines the best of separately managed accounts with the best of traditional investment accounts.



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Making money make sense™