

# BMO Nesbitt Burns Gateway®

BMO Nesbitt Burns Gateway (“Gateway”) is your online portal to a world of information about your BMO Nesbitt Burns account(s). Available through tablet, mobile or your desktop, Gateway enhances your ability to track and manage your investments anywhere, anytime, and complements the personalized advice and services you receive from your BMO Nesbitt Burns Investment Advisor.

Through Gateway you’ll have access to information and tools to help you monitor your investments and keep updated on your account(s), including the following:

## A snapshot of your account

The Gateway **homepage** provides a summary of your account(s) and investments; listing each account and its market value,<sup>1</sup> as well as providing a consolidated value for all your accounts. The **Message Centre** and **Bulletin Board** provide important information from BMO Nesbitt Burns that could impact your account(s), and should be reviewed regularly to make certain you keep updated. And, if you need assistance, contact information for your BMO Nesbitt Burns Investment Advisor and the Gateway Help Desk is available through the **Contact Us** section.

## Detailed security information

Through Gateway, you have access to up-to-date account information and tax-adjusted average cost and gain/loss information for each security held in your account(s), as well as tools for organizing your financial data, such as:

- Your account holdings, including a breakdown by currency and asset mix, by account or on a consolidated basis;
- Historical details of your account transactions for the past 24 months;
- Contributions and withdrawals made to or from your registered account(s) for the current and previous year; and
- The ability to download your account holdings and transaction history into an Excel® spreadsheet, so you can conduct your own analysis.

## Virtual portfolios, quotes and other information

The **Virtual Portfolio** feature allows you to create up to five hypothetical portfolios and track them over time. This enables you to keep an eye on securities that you don’t currently own, but might be interested in purchasing sometime in the future.

You can also obtain quotes<sup>2</sup> and key fundamental data on North American stocks and options, as well as quotes on Canadian mutual funds. One click gives you easy access to price information for all quotable securities (stocks and options) held in your portfolio, including the day’s most active Canadian and U.S. securities being traded.

For additional information, view charts and news stories about companies held in your portfolio, or those you want to follow, by choosing news feeds that keep you in-touch with what’s happening in the markets. Your Investment Advisor can also provide access to select research reports and alerts.

## Choose eDocuments

If you’ve chosen to access your BMO Nesbitt Burns account statements and trade confirmations exclusively through Gateway, you can view and download up to seven years’ history of these eDocuments through the site.

If you haven’t signed-up for eDocuments, don’t delay. It takes only a moment, and will help reduce the amount of paper you receive, while providing easy access to your eDocuments anywhere, anytime.

## Connect with your Advisor

Gateway ensures you to stay connected to your BMO Nesbitt Burns Investment Advisor every step of the way, by providing a link to their email and website at the top of every Gateway page. This allows you to share ideas and communicate with them without ever leaving the site.

## Get connected today

All BMO Nesbitt Burns clients can enjoy the benefits of Gateway at no cost.



Contact your BMO Nesbitt Burns Investment Advisor to get signed up and start experiencing the benefits of Gateway today.

<sup>1</sup>Please note that account information is updated overnight to reflect the previous business day's market close prices.

<sup>2</sup>Please note that all quotes displayed in Gateway are delayed by 20 minutes.



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