

Meridian Program

Program Overview

If you are an investor who enjoys actively participating in the day-to-day decisions involving your investments, conducting investment research and staying abreast of current corporate and investment news, taking a non-discretionary approach may be for you. The BMO Nesbitt Burns Meridian Program® allows you to maintain control, by providing a truly collaborative approach to investing. Working with your BMO Nesbitt Burns Investment Advisor, you participate in all investment decisions, deciding how much and how directly you want to be involved in building your financial future.

Evolution of the Client Advisor Relationship

Your BMO Nesbitt Burns Investment Advisor is always available to help – from guiding you in establishing and monitoring a personal investment strategy, to providing suitable investment ideas and executing trades, to giving you feedback on your own ideas, and more – all for one competitive fee.

Keeping You Well Connected

You have unlimited access to BMO Nesbitt Burns Gateway® (Gateway), our leading-edge online client information centre. Through Gateway, the investment world is at your fingertips. You can access your account information, receive real time quotes on securities, place equity and mutual fund trades and access our highly ranked research¹. All the information included in your regular monthly statements is updated daily and available on your screen.

Advisory Fee

One fee covers the cost of services and benefits, including expert consultation and advice, access to a wealth of investment research², the ability to execute trades through your Investment Advisor or online and access to web-based account information. With an upfront knowledge of fees, you and your Investment Advisor can focus on realizing your objectives based solely on your needs and personal circumstances.

¹ Ranked (#1 or 2) for the past 30 years by Brendan Wood International.

² Online research through Gateway is available to qualifying clients. Ask your BMO Nesbitt Burns Investment Advisor for further information.



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