

Meridian Program[®]

Professional investment management for one all-inclusive annual fee

The BMO Nesbitt Burns Meridian Program (“Meridian”) is a fee based, client-directed program that provides all the benefits of full service investing for one annual fee. Instead of paying commissions on each trade, the annual fee provides you with a trade allotment based on the value of your account, or Billing Group assets, and covers all associated program costs.

Maintain control over your investments

Meridian is best suited for investors who prefer to have control of their investment decisions and certainty regarding the fees they pay. It is also well suited for investors who may trade actively. Because Meridian is a client-directed, non-discretionary account, you have the final say in all investment decisions made for your account. Your BMO Nesbitt Burns Investment Advisor provides you with advice and guidance to help you make informed choices for your portfolio. With no commission charges to execute transactions in your account, you can take advantage of trading strategies appropriate for your investor profile without incurring additional transaction fees, providing you are within your annual trade allotment.

The number of trades allotted per year is based on the value of your account, or Billing Group assets. Your BMO Nesbitt Burns Investment Advisor can confirm the number of trades with you. As a benefit, new accounts receive an additional 50% more trades in the first year within the program.

Enjoy pricing flexibility

There is no minimum investment amount required to open a Meridian account, making the program ideal for your smaller accounts. You also have the option to consolidate your registered and non-registered accounts – as well as other qualifying accounts across your household – within a Meridian Billing Group to lower the overall fee. A Billing Group account can include, but is not limited to, Individual Accounts, Joint

accounts, and Corporate or Holding Company accounts.

Meridian provides fee flexibility through the availability of different fee structures, which are tailored to meet your needs and give you upfront knowledge of all costs. Together with your BMO Nesbitt Burns Investment Advisor, you can discuss which fee option is best suited to you.

As an added benefit, the fees payable for non-registered Meridian accounts may be tax deductible. Please consult with your tax professional regarding your personal situation. As well, there is no administration fee for registered Meridian accounts.

Getting started with Meridian

The Meridian Program provides exceptional value for one all-inclusive fee. With full transparency of costs, you can focus on your financial goals with confidence and the support of your BMO Nesbitt Burns Investment Advisor.



BMO Nesbitt Burns offers a range of solutions for all investor types. For more information about whether the Meridian Program is suitable for your situation, please contact your BMO Nesbitt Burns Investment Advisor.