

# Welcome to Gateway<sup>®</sup>

Thank you for signing up for BMO Nesbitt Burns Gateway (“Gateway”). Your Gateway account has been activated and can be accessed at <https://gateway.bmonesbittburns.com/>. (Please note: Access to Gateway **may take up to 24 hours** once the account has been opened.)

To log in to Gateway for the first time, you will require the User ID provided below, as well as **your temporary password, which will be sent to you in a separate email**. Once received, you can log in to Gateway and set up your permanent login credentials and complete the enrollment for Two-Step Verification. Enrolling in Two-Step Verification adds an additional layer of security to your Gateway account.

User ID:

Logging in to Gateway for the first time (<https://gateway.bmonesbittburns.com/>)

1. Enter the User ID above in the **User ID** field.
2. Enter your temporary password in the **Password** field.
3. Click **Sign In**.

## Setting up your login credentials

<b>Step 1:</b> Set up your new password	<ol style="list-style-type: none"> <li>1. Click <b>Get Started</b> after entering your temporary password.</li> <li>2. Enter a new password<sup>1</sup> in the <b>New Password</b> field, making sure that all requirements for selecting a password are met (i.e., all checkmarks below the <b>New Password</b> field have turned green).</li> <li>3. Retype your password in the <b>Confirm Password</b> field, making sure that your passwords match (i.e., the checkmark below the <b>Confirm Password</b> field has turned green).</li> <li>4. Click <b>Continue</b>.</li> </ol>
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<p><b>Step 2:</b> Verify your email address</p>	<ol style="list-style-type: none"> <li>1. Enter your email in the <b>Email Address</b> field, and then confirm your email by re-typing it in the <b>Confirm Email Address</b> field.</li> <li>2. Check the box indicating that you have read and accept the <b>Terms and Conditions</b>.</li> <li>3. Click <b>Submit</b>.</li> </ol> <p>After clicking <b>Submit</b>, an email including a link to verify your email address will be sent to your inbox. Please note that you will be logged out of Gateway until you have verified your email address by clicking the verification link in the email sent to you.</p> <p><b>To verify your email address:</b></p> <ol style="list-style-type: none"> <li>4. Go to your email inbox and open the email with the subject line <b>BMO Nesbitt Burns Gateway</b>.</li> <li>5. Click the verification link in the email to complete the set-up process.</li> <li>6. <b>Note:</b> If you are unable to locate the confirmation email, check your <b>junk folder</b>.</li> </ol>
<p><b>Step 3:</b> Log back in to Gateway</p>	<p>Return to the Gateway login page at <a href="https://gateway.bmonesbittburns.com/">https://gateway.bmonesbittburns.com/</a>. Enter your User ID and new password in the respective fields to sign in again.</p>
<p><b>Step 4:</b> Enroll into Two-Step Verification (“TSV”) and create your custom User ID<sup>2</sup></p>	<ol style="list-style-type: none"> <li>1. Once you’ve signed in successfully, you’ll be directed to the <b>Two-Step Verification Enrollment</b> page. Click <b>Set Up Now</b> to continue.</li> <li>2. Create and enter a <b>custom User ID</b> in the <b>Enter a User ID</b> field and click <b>Continue</b>. (You will not see this step if a custom User ID was already created for you by your Investment Advisor.)</li> <li>3. Register at least one phone number for you to receive <b>One-Time PIN (“OTP”) verification codes</b>, if applicable, to protect your account. Additionally, if you want to designate the device you are using as trusted, check the <b>Add this device to your list of trusted devices</b> box. Click <b>Next</b> to continue.</li> <li>4. Review the <b>Online Access Agreement</b> and click <b>Next</b>.</li> <li>5. Registration is now completed. A confirmation page will appear and from this point forward, you can only use your custom User ID to access Gateway. The User ID provided above will no longer be valid to gain access to Gateway.</li> </ol>

## Forgot your password?

You can reset a forgotten password, or change an existing one, at any time.

- To reset your forgotten password, simply click the **Forgot Your Password?** link on the Gateway login page and follow the prompts.
- To change your existing password, go to **Account Settings >> Profile** and click **Edit** beside **Login Password**.

## eDocuments and Email Alert Preferences

Through Gateway you can manage how you receive certain documents, either in the mail or available in electronic format exclusively on Gateway. This includes account statements, trade confirmations (including ETF Facts and Mutual Fund Fund Facts, if applicable), and tax documents. Additionally, you can set up **Email Alerts** for specific accounts and specific documents and receive an alert to your specified email when these documents are available on Gateway.

## Registering for eDocuments and Email Alerts

1. Log into Gateway (<https://gateway.bmonesbittburns.com/>) using your **custom User ID** and **Password**.
2. Select **Account Settings** from the top navigation.
3. Select the **eServices** tab to set up your preferences for eDocuments and Email Alerts.

**Note:** The **Guide to BMO Nesbitt Burns Gateway eDocument and Email Alert Preferences** provides detailed instructions on registering and updating your eDocuments and Email Alert preferences. Please ask your BMO Nesbitt Burns Investment Advisor for a copy of this Guide to assist you with this process.

As a reminder, always take precautions to protect your confidential information; do not share your login credentials and always store confidential information, such as your Gateway User ID and password, in a safe place.

If you have any questions about using Gateway, our Two-Step Verification process or eDocuments, please contact your BMO Nesbitt Burns Investment Advisor or the Gateway Helpdesk at 1-877-873-7664 between 8:00 a.m. to 6:00 p.m. ET, Monday to Friday, or by email at [gateway.helpdesk@bmonb.com](mailto:gateway.helpdesk@bmonb.com).



<sup>1</sup>Your new password must have between eight and 30 characters, one uppercase letter, one lowercase letter, and one number. Special characters (.,!@#\$\$%^&\*") are also permitted.

<sup>2</sup>Your User ID should be between nine and 30 characters in length, and it can include any combination of letters and numbers. However, your email address cannot be used as your User ID.

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