

# 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.