

BMO NESBITT BURNS

# BluePrint Program®





## Because you have more important things to do

Many individuals today look for a better way to manage the complexities and choices that now come with investing. Others look for a way to invest that will protect a valued asset – time.

The BMO Nesbitt Burns BluePrint Program (BluePrint Program) offers a unique approach to investing that allows you the time to focus on what matters most in life to you – whether that be your family, your friends or other interests. Managed asset programs, like the BluePrint Program, provide you with all the benefits of professional money management, adherence to sound risk management principles and stringent portfolio monitoring. You help to set the strategic overall approach and leave the day-to-day implementation to the experts.

Free yourself from the ongoing task of monitoring the markets and making day-to-day investment decisions and take comfort in knowing that these decisions are being guided and managed by a team of experts beginning with your BMO Nesbitt Burns Investment Advisor.

## A disciplined approach to building wealth

Together with BMO Financial Group's institutional portfolio managers, Jones Heward Investment Counsel, Harris Investment Management and Pyrford International Ltd., the BluePrint Program has been providing clients with cost-effective and efficient ways to access BMO Financial Group's internal strengths of Canadian equity research and Canadian, US, global, international and fixed income portfolio management.

BMO Financial Group's knowledgeable professional portfolio managers will execute sound investment decisions on your behalf. They are responsible for the day-to-day investment decisions and monitor performance prudently so you can focus on enjoying life with the assurance that your investments are handled with care and diligence for one all-inclusive fee.

With the help of your BMO Nesbitt Burns Investment Advisor, you can determine which of the following portfolios will align best with your investment objectives.

## BluePrint Equity Portfolios

Historically, equities have outperformed other investment vehicles. Building from this foundation, the investment teams of Jones Heward Investment Counsel, Harris Investment Management and Pryford International set out to increase that margin for you by selecting companies they believe will maximize long-term growth without unduly increasing risk.

### Canadian Equity Portfolio

- Designed for investors seeking long-term capital appreciation while providing broad diversification across industry sectors in order to minimize the volatility of the portfolio.
- The portfolio holds large capitalization companies that have been forecasted to outperform the market by BMO Capital Markets' top ranked Research Team.<sup>1</sup>

### U.S. Equity Portfolio

- Designed for investors seeking above-average, long-term growth within the U.S. markets.
- All companies in the portfolio are large, well-capitalized firms and have the potential for above average growth in the long-term.

## **Total Equity Portfolio**

- Designed for investors seeking long-term capital growth through a globally diversified portfolio.
- The Canadian equity component is comprised of the existing BluePrint Canadian Equity Portfolio.
- Through the use of exchange-traded funds, there is added exposure to major global regions – the United States, Europe, Australasia and the Far East.

## **International Equity Portfolio**

- Designed for investors seeking long-term capital growth through an internationally diversified portfolio.
- The stock selection universe is generally focused on medium to large capitalization companies in Europe, Australasia and the Far East regions.

## **Global Equity Portfolio**

- Designed for investors seeking long-term capital growth through a globally diversified portfolio.
- The stock selection universe is generally focused on medium to large capitalization companies in North America, Europe and Asia-Pacific regions.

## BluePrint Canadian Balanced & Balanced Portfolios

With the BluePrint Balanced Portfolios, you have the ability to invest in a widely diversified selection of high quality equity and fixed income investments selected to maximize long-term growth.

These portfolios are designed for investors seeking long-term capital growth consistent with the preservation of capital and liquidity by investing primarily in equity and fixed income securities.

### Canadian Balanced Portfolio

- Provides investors access to the long-term track record of the BluePrint Canadian Equity Portfolio coupled with the risk reduction benefits of actively managed fixed income holdings.

### Balanced Portfolio

- Provides investors access to the long-term track record of the BluePrint Canadian Equity Portfolio combined with the risk reduction benefits of global diversification through exchange-traded funds and actively managed fixed income holdings.

## BluePrint Fixed Income Portfolios

With the BMO Nesbitt Burns BluePrint Fixed Income Portfolios, you have the ability to invest in a widely diversified portfolio of high quality income-generating North American investments selected for credit-worthiness and liquidity by a professional portfolio manager.

The following portfolios are designed to achieve favourable returns while minimizing the potential risks to capital and maintaining the liquidity of the portfolio. As with all actively managed bond portfolios, and unlike term deposits or guaranteed investment certificates, the values of these portfolios will fluctuate with interest rates.

### **Canadian Fixed Income Portfolio**

- Designed for investors whose investment focus is primarily on long-term total return and do not require income.

### **Monthly Pay Portfolio**

- Designed for investors seeking a predictable monthly income and an actively managed bond portfolio.



## U.S. Fixed Income Portfolio

- Invested solely in U.S. dollar denominated fixed-income securities, this portfolio is designed to provide investors with consistent total returns and currency diversification.

## Trustee Account Portfolio

- Designed specifically for investors who have chosen or are required by law to follow the guidelines of the Trustee Act in their home province.

## The BMO Nesbitt Burns BluePrint Program Offers

- **Peace of mind – a truly sound and time proven investment strategy.** Proven over decades, a long-term investment focus is the key to investment success – the cornerstone of the BluePrint Program.
- **Simplicity and confidence – the crucial role of timeless advice.** The universe of bond and equity investments can be daunting. But even when the choices have been narrowed down to five equity portfolios, two balanced portfolios and four fixed income portfolio choices, your BMO Nesbitt Burns Investment Advisor makes a crucial contribution – helping

you establish the ideal allocation of investments within these portfolio choices to meet your growth, income and risk requirements.

- **Power and precision.** The BluePrint Program assures that your investments are managed using a disciplined, long-term approach. The program combines the expertise of your Investment Advisor, BMO Capital Markets' top ranked Research Team<sup>1</sup> and professional portfolio managers.

We invite your calls  
and questions.

Talk to your BMO Nesbitt Burns  
Investment Advisor to learn more.

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<sup>1</sup>Brendan Wood International Survey, Institutional Equity Research, Sales and Trading Performance in Canada, 2007 Report.

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