

The Benefits of Going Paperless with BMO Nesbitt Burns Gateway

Reducing clutter and accessing your account information online are among the many benefits of eliminating paper-based statements through BMO Nesbitt Burns' Gateway. In addition, going paperless with Gateway enhances your ability to track and manage your investments through valuable online features, such as detailed real-time account information and leading market research and news.

If you haven't begun the process of eliminating paper-based statements through BMO Nesbitt Burns Gateway, or are perhaps considering going paperless, here are some important incentives to bear in mind.

Eliminate the need to file

Paper-based statements of course pile up, causing clutter, overflowing your filing cabinets and taking up space; they may also take longer to reach you by mail. You can minimize this clutter by converting to 'eStatements only,' which can easily be done through the BMO Nesbitt Burns Gateway **eServices** section.

You can view your eStatement through the **Account Info** link, selecting the account you wish to view and clicking on the **Statements** tab. From there, you can select the statement period you wish to access. Statements are viewed in Gateway as a non-editable PDF file with print ability, and are held on file for seven years.

Manage all your finances through BMO Online Banking

If you're also a BMO Bank of Montreal banking client, you can view your BMO Nesbitt Burns account(s) and access Gateway directly through BMO Online Banking – conveniently allowing you to combine and manage all your finances online. Once you're registered and receive your Gateway user ID and password, you can enable this feature via the **My Profile & Preferences** and **Link My Accounts** sections on the BMO Online Banking website, without having to repeat the sign-in process for Gateway.

Protect your information

Left exposed or in your mailbox, paper-based statements with personal information pose a security threat; whereas online statements are protected by usernames, passwords and various other security measures. BMO Nesbitt Burns Gateway uses Entrust Certification Authority, allowing for 128-bit encryption with clients in Canada, the U.S. and around the world; 128-bit encryption technology is the most secure form of encryption currently available in North America.

Access instant, up-to-date account information

BMO Nesbitt Burns Gateway provides clients with convenient access to their accounts seven days a week, 24 hours a day, anywhere you have online access. In addition to providing access to your account statement(s), Gateway provides up-to-date account information and tax adjusted average cost and gain/loss information for each security in your account, along with numerous other tools for organizing your financial data, such as:

- **Account Holdings** – View or download your account holdings in a single account or by account type (e.g., cash, margin, etc.).
- **Transaction History** – View or download up to 24 months of past activity, which means no more shuffling through old statements at tax time.
- **Asset Mix** – Review your asset allocation for each account or on a consolidated basis; quickly sort your holdings into asset categories with percentages and market values for each asset group.
- **Portfolio Quotes** – Extracts all quotable securities (stocks and options) from your holdings and gives you a quote on each one.
- **RRSP Details** – Conveniently allows you to view domestic and foreign content, as well as previous and current yearly contributions in your registered account.

Complementary news and leading research

With Gateway, you can access leading BMO Nesbitt Burns and BMO Capital Markets research and webcasts, as well as third party research when you need it, on Canadian and U.S.-listed equities, and investment funds. You can also get news updated daily on the categories of your choice, along with other useful tools for staying in-touch with the markets; namely:

- **Summary of Changes** – Allows you to search for earnings per share, rating, and target price changes for companies tracked by our BMO Nesbitt Burns equity research team.
- **Alerts** – Displayed beside your equity or investment fund holdings whenever new BMO Nesbitt Burns and third-party equity research has been published.
- **Comments/Reports** – Provides you with real-time access to the entire BMO Nesbitt Burns research database. Search by industry, symbol and/or date for companies covered.
- **Third Party Equity Research** – Allows you to search for independent third party equity research published by S&P Capital IQ.

Please note that access to research on Gateway must be enabled by your BMO Nesbitt Burns Investment Advisor.

Track prospective stocks, options and mutual funds

BMO Nesbitt Burns Gateway gives you the ability to create up to five portfolios outside of your actual holdings and track them over time, through the **Virtual Portfolio** section. This is a convenient way for you to keep an eye on securities that you don't own, but might be interested in purchasing sometime in the future.

Gateway's **Market Data** section provides you with detailed equity, options and mutual fund quote information, including price and fundamental data. And, the **Market Movers** section provides you with quote information on the most active Canadian and U.S. securities by volume and value including quotes for top gainers and losers by volume and percentage.

Instant communication and real-time trading

Importantly, as well, Gateway enables you to be completely connected to your BMO Nesbitt Burns Investment Advisor through the **Message Centre**, or by clicking on the **Contact my IA** link located on the top right section of every page on the Gateway site. You can also connect to your Investment Advisor's personal website through virtually every Gateway screen – allowing you to share ideas, communicate on an ongoing basis and, ultimately, make the most appropriate investment decisions for your portfolio.

BMO Nesbitt Burns Meridian Program® clients also have the option of placing equity and mutual fund trades online. Regardless of how the trade is executed, all BMO Nesbitt Burns Gateway clients can view the real-time status of all trades placed in the last 48 hours.

Get started with Gateway

All existing BMO Nesbitt Burns clients can enjoy the benefits of Gateway at no cost. Before receiving access to Gateway, you must complete the online [Gateway Client Agreement form available here](#), or contact your BMO Nesbitt Burns Investment Advisor and request that a Gateway Client Agreement form be sent to you. Complete and sign the form and return it to your Investment Advisor. You'll be contacted when your Gateway ID and password are available.

If you would like more information on Gateway, contact your BMO Nesbitt Burns Investment Advisor or visit the Gateway site at <https://gateway.bmonesbittburns.com>.



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