

BMO INVESTMENTS INC. (BMOII)

OMEGA FOUNDATION GIFT: PURCHASE IN A BMO REGISTERED EDUCATION SAVINGS PLAN (RESP)

The Omega Foundation is a Canadian Registered Charity who offers RESP beneficiaries the opportunity to receive additional contributions. These additional contributions (the “Gift”), plus government incentives will help to save and grow your RESP for your beneficiaries’ Post-Secondary Education.

_____	_____
Subscriber Last Name	Subscriber First Name
Beneficiary Last Name	Beneficiary First Name
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____

*If more beneficiaries are named on this plan, please include on a second form.

Please read carefully and sign below

By signing below, I acknowledge that these Gifts are at the Omega Foundation’s full discretion: the Omega Foundation will decide whether or not to make a Gift and the value of such Gift.

I acknowledge that upon receipt of this Gift, the funds will be deposited into my RESP with the intention that the proceeds will be used for educational purposes only.

I further acknowledge that the Gift will be deposited into savings. If I wish to change the investments in my RESP or if my investor profile or financial circumstances have changed, I acknowledge that I will need to meet with a BMO Investments Inc. representative to review my account and make any changes as may be recommended.

I understand that the Gift will be considered a contribution to my RESP, adding to the beneficiary’s lifetime maximum of \$50,000.

I understand that my RESP is governed by terms and conditions as referenced in the account opening form.

Privacy Consent

I consent to the disclosure by BMO Investments Inc. to the Omega Foundation of my personal information for the purposes of administering the Gift, if any, and, if the Omega Foundation made a Gift to my RESP, of any subsequent withdrawals for the purpose of determining whether or not the withdrawal was made for educational purposes.

_____	_____
Subscriber’s Signature	Date (DD/MMM/YYYY)
(May be either Subscriber if Joint and Several)	