

# Partnering with BMO Insurance

We're dedicated to defining a great customer experience for our mutual clients, and are strongly committed to supporting independent advisors and Managing General Agents like you. When you partner with BMO Insurance, you get innovative products, tools and services to help you build your business.



## Innovative Products

Explore our full range of life (whole life, universal life, Term 100, Term 10, 15, 20, 25 and 30 years terms) and critical illness insurance policies, Guaranteed Investment Funds (segregated funds) and income annuities.



## Effective Insurance Concepts

Explore our innovative insurance and wealth planning concepts that can help you find the right solutions for your clients to meet their financial planning objectives.



## Our Expertise

We can help you package your complex large cases with our team of experts from our Advanced Marketing and Business Development Managers to our Elite Underwriting Team.



## Easy-to-use Tools

Visit [bmoinsurance.com/advisor](https://bmoinsurance.com/advisor) to learn more about our easy-to-use advisor tools to help you create the right insurance strategies for your clients, prepare quotes, submit applications and track your new and in-force business.



## Financial Strength and Integrity

We have one of the most respected brands in Canada backed by the proud legacy of our predecessor companies and the strength of BMO Financial Group.

**AM Best Rating of A (Excellent)<sup>1</sup>**

## About BMO Insurance

As a member of BMO Financial Group and its Wealth Management operating group, BMO Insurance brings to you and your clients the financial strength and stability that comes from one of the most respected brands in Canada. Our insurance business has a solid history and reputation for being a trusted insurance provider for thousands of Canadians, including their families and businesses. Backed by the financial strength of BMO Financial Group and the legacy of our predecessor companies, BMO Insurance is confident that we are able to meet the financial obligations we make to all our policyholders.

## About BMO Financial Group

Serving customers for 200 years and counting, BMO is a highly diversified financial services provider – the 8th largest bank, by assets, in North America. With total assets of \$988 billion as of October 31, 2021, and a team of diverse and highly engaged employees, BMO provides a broad range of personal and commercial banking, wealth management and investment banking products and services to more than 12 million customers and conducts business through three operating groups: **Personal and Commercial Banking, BMO Wealth Management and BMO Capital Markets.**

We serve Canadian clients through BMO Bank of Montreal®, our personal and commercial banking business, BMO Nesbitt Burns®, one of Canada's leading wealth management firms, and BMO Capital Markets™, our North American investment and corporate banking division.

In the United States, clients are served through BMO Harris Bank, a major U.S. Midwest personal and commercial bank, and

BMO Private Bank, with wealth management offices across the United States, as well as BMO Capital Markets™, our North American investment and corporate banking division. On July 5, 2011, BMO announced that it had completed the acquisition of Milwaukee-based Marshall & Ilsley Corporation (M&I). M&I merged with Harris Bank to form BMO Harris Bank N.A., part of BMO Financial Group. This integration was completed on October 8, 2012, and all branches now operate under the name BMO Harris Bank.

We help our customers make money make sense by delivering the broadest range of financial services through a single point of contact. Our financial service professionals provide access to any services our customers require across the entire enterprise.

## Let's connect

To find out more about BMO Insurance products, please call your MGA, contact the BMO Insurance regional sales office in your area or call 1-877-742-5244.

**BMO Life Insurance Company, 60 Yonge Street  
Toronto, ON M5E 1H5**



### Ontario Region

1-800-608-7303

### Quebec-Atlantic Region

1-866-217-0514

### Western Region

1-877-877-1272



[bmoinsurance.com/advisor](https://bmoinsurance.com/advisor)



We're here to help.™

<sup>1</sup> Rating as of November 18, 2021. Subject to change.

The information in this publication is intended as a summary of our products and/or services and may include projected values based on a set of assumptions. Actual results may not be guaranteed and may vary. Please consult the appropriate policy contract for details on the terms, conditions, benefits, guarantees, exclusions and limitations. The actual policy issued governs. Each policyholder's financial circumstances are unique and they must obtain and rely upon independent tax, accounting, legal and other advice concerning the structure of their insurance, as they deem appropriate for their particular circumstances. BMO Life Assurance Company does not provide any such advice to the policyholder or to the insurance advisor.

Insurer: BMO Life Assurance Company

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