

Value where it counts.
Innovation where it matters.
Centred on you.

Mutual funds

ETFs

Segregated
funds

Alternatives

Structured
solutions

Liquid alts

The most comprehensive suite on the street

Spend less time managing and more time advising

We are leaders in helping you build better portfolios. From core strategies to specialized mandates, our comprehensive suite of solutions covers virtually every need – giving you more time to focus on clients with the building blocks to meet their investment objectives. Some of the goals we can help you achieve include:

- Low cost
- Income
- Tax efficiency
- Portfolio simplification
- Risk mitigation
- Access to innovative solutions

Your partner in blending active and passive

BMO GAM's comprehensive suite includes both active and passive investment solutions – everything you need to construct a well-rounded portfolio:

- Our actively-managed solutions are guided by an industry-leading team of experienced portfolio managers, including specialists in virtually every category: global equities, fundamental equities, active fixed income, and more.
- Our broad range of index funds – with F-series MERs from 0.06%⁸ – bring some of Canada's most popular ETFs to you in a familiar format, including solutions to potentially smooth out returns and better meet client objectives.

Active **plus** passive. Leverage our sales team's experience to find the right combination for your client.

One team.

110+ investment professionals.¹

120+ strategies crafted by Canadians, for Canadians.²

\$263 billion in assets under management.³

7 LSEG Lipper Fund Awards (2025).⁴

8 FundGrade A+[®] Awards (2025).⁵

47 Morningstar 5-star funds.⁶

#1 provider in Canada of discretionary ETFs (active, quantitative, and covered calls)⁷

#1 provider in Canada of fixed income ETFs⁷

#2 provider in Canada of index equity ETFs⁷

One relationship to access all of BMO GAM's investment solutions.

Compete with anyone on the street

Spend less time searching for solutions and more time building your book. Our product suite and financial planning resources give you the tools to level the playing field with any Advisor on the street. Services we offer to support your practice include:

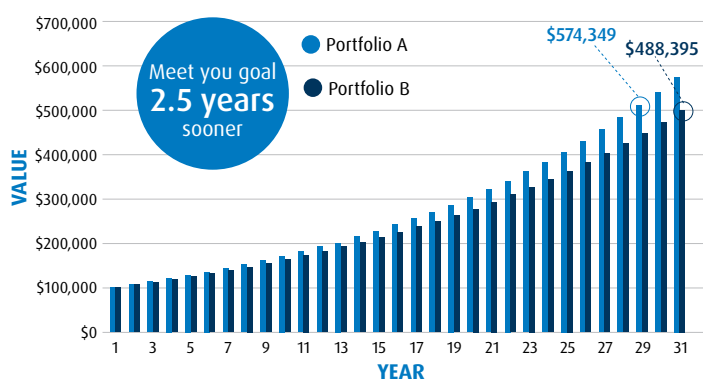
- ✓ **Extensive market research:** Including regular insights from trusted strategists and portfolio managers who frequently appear on Bloomberg and other outlets.
- ✓ **Practice management resources:** Including referrals, know-your-product (KYP), automatic portfolio rebalancing,

continuing education (CE) credits, smart forms, and our Total Cost Reporting (TCR)/Client Relationship Model Phase 3 (CRM3) toolkit.

- ✓ **A comprehensive, constantly-expanding product suite:** Featuring solutions to meet your clients where they are.
- ✓ **Portfolio consulting services:** Helping you reach your clients' financial goals faster and make their money last longer (see charts below).

The power of fees over time

Accumulation Phase: Paying less fees adds up

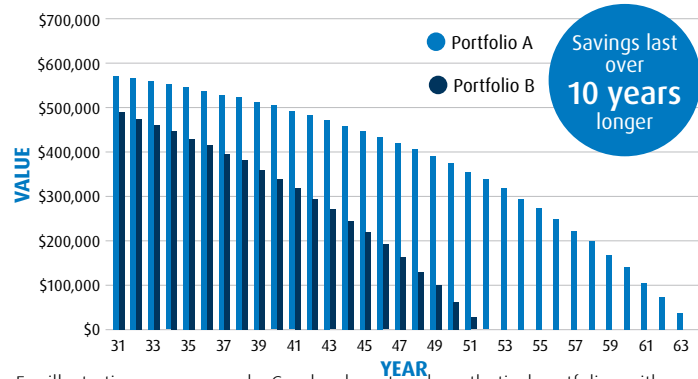


\$8,271
in additional savings
after 10 years

\$28,938
in additional savings
after 20 years

\$75,954
in additional savings
after 30 years

Deaccumulation Phase: Savings last longer with lower fees



For illustrative purposes only. Graphs show two hypothetical portfolios with an initial investment of \$100,000 each and goal of reaching \$500,000 in 30 years. Portfolio A pays 0.5% less in fees each year, as compared to Portfolio B. Assumes an annual rate of return of 6% with no distributions and withdrawals of \$40,000 per year beginning in year 31.

For more information on BMO GAM's products and services, visit our [Advisor resources page on BMOGAM.com](#) or contact your [BMO Global Asset Management sales representative](#).

¹ Source: BMO GAM, as of December 31, 2025.

² Source: BMO GAM, as of December 31, 2025.

³ Source: BMO GAM, as of December 31, 2025.

⁴ Source: [BMO Recognized for Excellence with Twelve 2025 LSEG Lipper Fund Awards - November 6, 2025](#).

⁵ Source: [BMO Recognized for Excellence at Fundata FundGrade A+® Awards - February 6, 2026](#).

⁶ Source: Morningstar, as of June 15, 2026.

⁷ As measured by percentage share of AUM. Source: "Canadian ETF Weekly," TD Securities, June 22, 2026.

⁸ Source: BMO GAM, as of January 31, 2026.

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