

Personal Data

Province: Ontario
Annuitant: Annuitant
Sex: Male
Date of Birth: 08 Aug 1956
Age at purchase: 62

Single Premium Details

Amount: \$124,500.00
Purchase Date: 15 Dec 2018
Source of Funds: RRSP (Registered Retirement Savings Plan)

Annuity Details

Annuity Type: Single Life
Income Amount: \$629.11
Income Frequency: Monthly
Guaranteed Period: 10 years 0 months
First Payment Date: 15 Jan 2019
Annual Taxable Portion: Income Payments Fully Taxable/See Tax Schedule

Notes

- (1) The rate basis for this quote is guaranteed if a faxed copy of the application with a Request for Rate Guarantee and this quote are received in Head Office no later than midnight of the day following the day this quote was produced, and the Single Premium Amount is received by BMO Insurance within 45 days of today's date. Otherwise, rates are subject to change on a daily basis.
- (2) The Purchase Date is the date the Single Premium Amount is received by BMO Insurance. In order to obtain the Annuity Income Amount quoted, the Single Premium Amount must be received at our Head Office on or by the Purchase Date quoted.
- (3) Any changes (i.e. the date all funds are received at our Head Office (Purchase Date), Single Premium Amount and/or First Payment Date, etc.) to this quote will result in a change in the Annuity Income Amount.
- (4) All payments made to or by BMO Insurance must be made in Canada in Canadian currency.
- (5) Please sign the Advisor's Report on the application. By law, the annuity cannot be issued without this signature.

Insurer: BMO Life Assurance Company

Prepared by:

Single Premium Immediate Annuity Version SPIA V9.0/17-10/1

Phone:

November 28, 2018

Rate basis: November 28, 2018

Time 09:06:43

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