

Example ~ RDSP Statement



Account Number

January 1 to March 31, 2019



Name of Account Holder

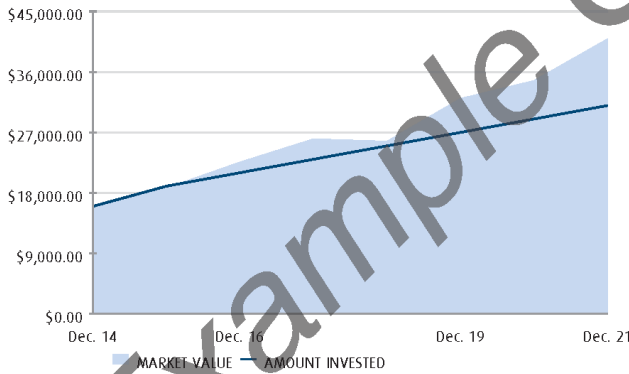
Please direct inquiries to your Financial Advisor:

John Anonymous
Investments Are Us
123 Dream Avenue NW
Calgary, AB
T2B 3C4

Your Registered Disability Savings Plan

Your progress

This graph provides you with a visual snapshot of how your investments are performing. The change in value of your account is \$9,948.88 since account opening.



Changes to your account

	This period	This year	Since account opening
Opening value	\$38,652.87	\$34,734.54	\$0.00
You added	\$0.00	\$2,000.00	\$31,000.00
You withdrew	\$0.00	\$0.00	\$0.00
Amount invested	\$0.00	\$2,000.00	\$31,000.00
Change in value	\$2,296.01	\$4,214.34	\$9,948.88
Closing value	\$40,948.88	\$40,948.88	\$40,948.88

Account Balance

This chart shows the changes in the market value of your account and also reflects all cash and securities added, withdrawn and transferred into or out of your account. All values are reported at account level currency CAD.

Your statement

Account #12345678
January 1 to March 31, 2019



▶ Your personal rates of return

1 year	3 years	5 years	10 years	Since account opening*
11.73%	9.70%	5.43%	N/A	4.85%

These are the average rates of return for each year in the period, and have been calculated after fees and other charges have been deducted. Please see the **important information about your account** section of the statement for more information about how the rates of return have been calculated.

All values are reported at account level currency CAD.

▶ Your investment costs

Below are the fees and payments associated with your investments for the past 12 months.

	CAD\$
Fees you paid to your dealer	
Front end commission paid at time of trade	\$0.00
Dealer service fee	\$0.00
Sub total	\$0.00
Fees BMO Mutual Funds paid to your dealer*	
Service/trailer fees	\$378.11
Deferred Sales Charge (DSC)	\$0.00
Sub total	\$378.11
Grand total	\$378.11

* You are not directly charged the trailing commissions/service fee or the management fee. But, these fees affect you because they reduce the amount of a fund's return to you. Information about the management fees and other charges to your investment funds is included in the prospectus or fund facts document for each fund.

▶ Individuals related to your account

Type	Name
Beneficiaries	Jack Rae Smith

You may add or remove beneficiary (ies) from your account at any time. To modify your current selection, please contact your Financial Advisor.

▶ Your RDSP savings Name of Beneficiary ~ Young Adult's Name

Your disability savings	
Your total contributions*	\$14,500.00
Total Canada Disability Savings Grant	\$16,500.00
Total Canada Disability Savings Bond	\$0.00
Total Disability Assistance Payments	\$0.00
Total Repayments	\$0.00

* Your total contributions are made with after-tax dollars. Payments can be used for any purpose, as long as it is for the benefit of the person with the disability. The withdrawals are known as Disability Assistance Payments.