



QA Hackathon
- 6th March 2021

Things You Should Know -1

URL for QA Squad : <https://wealth.qa1.bmo.com/wealth/onboard/onlineinvesting/#/set-expectation?lang=en>


 **Wealth Management**
BMO InvestorLine

 Help  Resume application


Things you should know
Account Selection
Personal information
Contact information
Employment details
Family information
Beneficiary details
Financial details
Regulatory disclosures
Consents
BMO relationship
Account password
Final review

Things you should know


Opening a BMO InvestorLine Self-Directed account is easy. Here's what you'll need:




to be a **Canadian resident** (you live or have eligible ties to property, family or social services in Canada)




provide an **electronic signature**




a valid **Social Insurance Number (SIN)**




15-20 minutes to create an investor profile





to be at least the **age of majority** in your province or territory

 **tech.com**

Things You Should Know - 2

 **Wealth Management**
BMO InvestorLine


 Help  Resume application

Final review

eSignature


New to BMO? Get your documents ready

Keep them handy, we'll ask you to upload them later. If you're already a BMO client, you can skip this step.

[Here's what you'll need](#) 

Accounts available with Self-Directed

- ✓ Tax-Free Savings Account (TFSA)
- ✓ Registered Retirement Savings Plan (RRSP)
- ✓ Spousal Registered Retirement Savings Plan (Spousal RRSP)
- ✓ Cash (non-registered)
- ✓ Other (includes margin, joint, RESP, RIF and non-personal accounts)

Our [Privacy Code](#)  describes how we use and protect your personal information.

CONTINUE

Account Selection -1

Account type: TFSA

Select your account

Let's get started. Simply choose which account you'd like to open.

Tax-Free Savings Account (TFSA) ✓

SELECTED

Registered Retirement Savings Plan (RRSP)

SELECT

Cash (non-registered)

SELECT

Spousal Registered Retirement Savings Plan (Spousal RRSP)

SELECT

Other accounts

Includes margin, joint, registered, corporate and non-personal accounts.

LEARN MORE

[Learn more about the benefits of each account](#) ✓

Want to add options trading? ⓘ

Yes

No

How many years of experience do you have trading options?

Number of years

2

How would you describe your options trading knowledge?

Options trading knowledge

Limited

What type of options trading have you done?

☐ Long Calls / Puts

☒ Covered Calls / Puts

☒ Spreads

☐ Never traded options before

What type of options would you like to trade in your account?

☒ Long Calls / Puts

☐ Covered Calls / Puts

Covered puts can only be traded in non-registered margin accounts that allow short selling (TFSAs, RRSPs or Spousal RRSPs are excluded).

Account Selection - 2

Promo code

If you've got a code for one of our current offers, easily enter it here. Or, if you notice one that's already been added, you're good to go.

Enter promo code

APPLY CODE

Refer a friend bonus:

Got a friend that's an InvestorLine client? Earn a bonus with their referral code. We'll take you to a separate page to open your account and enter the code [here](#).

Promo code

If you've got a code for one of our current offers, easily enter it here. Or, if you notice one that's already been added, you're good to go.

Enter promo code

w32w

APPLY CODE

 Invalid code.

Refer a friend bonus:

Got a friend that's an InvestorLine client? Earn a bonus with their referral code. We'll take you to a separate page to open your account and enter the code [here](#).

BACK

LET'S GO

Application #:
Account

What's your name?

Enter your name as it appears on your Canadian government-issued photo ID (e.g. passport, driver's license, etc.).

Prefix ⓘ

Mr/M

Ms/Mme

Mrs

Miss

Dr

None

First name
Yogini

Middle name (Optional)
Manilal

Last name
Shingadia

What's your date of birth?

Select your birthday with our handy calendar tool. It will open as a small window so you

JUN | 04 | 1985

What's your Social Insurance Number?

Social Insurance Number
970834057 ⓘ

What's your email address?

We'll email you once your account is open. We may also follow-up with you if your application isn't finished. By giving us your email address below, you're okay with us doing this.


Email address
student-04-d9deac90cb42@qwiklabs.net


Are you a Canadian citizen?

Yes

No

Contact Information

 **Wealth Management**
BMO InvestorLine

 Help

Account selection

Personal information

Contact information

Employment details

Family information

Beneficiary details

Financial details

Regulatory disclosures

Consents

BMO relationship

Account password

Final review

eSignature

Enter one phone number where we can easily get hold of you when your account requires your immediate attention.

Mobile

Home

Work

Phone number
(992) 051-4400

Where do you live?

We need to know the address of your **primary residence** in Canada (i.e. where you spend most of your time). If your mailing address is different, you'll need to add that too.

Street number and name
Y-240 Holiday Inn Dr

Unit (Optional)

City
Cambridge

Province
Ontario

Postal code
N3C 3X4

Where do you want to receive your mail?

☐ At my primary residence

☐ At a different address or P.O. Box

Employee Information

- Things you should know
- Account Selection
- Personal information
- Contact information
- Employment details**
- Family information
- Beneficiary details
- Financial details
- Regulatory disclosures
- Consents
- BMO relationship
- Account password
- Final review
- eSignature

What do you do for a living?

We need to know where you work to help prevent unlawful activities such as money laundering.

Job status

Part-time (less than 30 hours per week)

Job description

Occupation

Business Developer

Job title

Architect

Nature of business

Banking

Employer or business description

Employer or business name

BMO

BMO group list

BMO InvestorLine

Country

Canada

Business street number and name

0-1310 Rue Gauvin

Unit (Optional)

2

City

Marieville

Province

Quebec

Postal code

J3M 1B9

BACK

FINISH LATER

CONTINUE

Application #: IL00140961
Account type: TFSA

✓ Things you should know

✓ Account Selection

✓ Personal information

✓ Contact information

✓ Employment details

Family information

Beneficiary details

Financial details

Regulatory disclosures

Consents

BMO relationship

Account password

Final review

eSignature

What's your marital status?

We're required to collect and update your marital status. If you're married or in a common-law relationship, we need to obtain your spouse's employment details and Social Insurance Number for tax purposes.

Marital status

Married



Spouse's information

First name

John

Initial (Optional)

Last name

Dan

☒ I designate my spouse or common-law partner as the successor holder for this account.

[Learn more](#)

What's your spouse's date of birth?

OCT | 08 | 1981




What's your spouse's Social Insurance Number?

Social Insurance Number
404-299-919



Spouse's employment details

Select one

Full-time (30 hours or more per week) 

Job description


Occupation

Business Owner - Real Estate Brokerage Owner 

Job title (Optional)

Architect

Nature of business

Architecture 

Employer or business description

Employer or business name

BMO

BMO group list

BMO Financial Group 