

RNS Announcement

Bank of Montreal

June 7, 2024

Regulatory Notice

Publication of Final Terms

Bank of Montreal has agreed to issue GBP 350,000,000 5.125 per cent. Senior Notes due 10 October 2028, Series 381, (the "**Notes**") pursuant to its U.S.\$22,000,000,000 Note issuance Programme (the "**Programme**").

The following document constitutes the final terms dated June 6, 2024 (the "**Final Terms**") relating to the issue of the Notes for purpose of Article 8 of Regulation (EU) 2017/1129 and as it forms part of domestic law by virtue of the European Union (Withdrawal) Act 2018 (EUWA) and must be read in conjunction with the Prospectus dated July 14, 2023, as supplemented by the supplements dated August 30, 2023, December 8, 2023, February 27, 2024 and May 29, 2024 relating to the Programme (together, the "**Prospectus**"). Full information on Bank of Montreal and the offer of the Notes is only available on the basis of the combination of the Final Terms and the Prospectus.

#### DISCLAIMER - INTENDED ADDRESSEES

Please note that the information contained in the Prospectus and the Final Terms may be addressed to and/or targeted at persons who are residents of particular countries (specified in the Prospectus) only and is not intended for use and should not be relied upon by any person outside these countries and/or to whom the offer contained in the Final Terms is not addressed. Prior to relying on the information contained in the Final Terms you must ascertain from the Prospectus, as supplemented by these Final Terms, whether or not you are part of the intended addressees of the information contained therein.

The Notes have not been and will not be registered under the United States Securities Act of 1933, as amended (the "**Securities Act**") and are subject to U.S. tax law requirements. Subject to certain exceptions, the Notes may not be offered, sold or delivered in the United States or to or for the account of a U.S. persons (as defined in Regulation S under the Securities Act).

Your right to access this service is conditional upon complying with the above requirement.

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