

# Wealth Themes

## Back to School

With the start of the school year, we have dedicated this edition of Wealth Themes to taking you “back to school” with a series of informative articles on important financial topics.

### **BMO Experts Share Their Most Important Investment Lesson**

Carl Kirst, Director of Research, U.S. Equities, BMO Capital Markets, and Lesley Marks, Chief Investment Strategist, BMO Private Banking, each share an important investment lesson they’ve learned during their careers.

[View the full article.](#)

### **Tax Planning Involving Family Trusts**

This article provides a comprehensive look at how trusts are defined and taxed, as well as discussing effective tax strategies.

[View the full article.](#)

### **Considering RESPs as Part of Your Estate Plan**

Learn how RESPs can be an important part of an estate plan, and some key estate planning considerations for individual and joint RESP subscribers.

[View the full article.](#)

### **Taking Money Out of an RESP**

This article explains the various types of RESP withdrawals, and outlines the post-secondary institutions and programs of study that qualify for Education Assistance Payments.

[View the full article.](#)

### **RESP Withdrawal Checklist**

This checklist is a useful tool when requesting a payment from your BMO Nesbitt Burns RESP.

[View the full article.](#)

Please don’t hesitate to contact the office if you have any questions about these articles.

#### **Featured Publications**

- [BMO Experts Share Their Most Important Investment Lesson](#)
- [Tax Planning Involving Family Trusts](#)
- [Considering RESPs as Part of Your Estate Plan](#)
- [Taking Money Out of an RESP](#)
- [RESP Withdrawal Checklist](#)



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