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

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BMO Wealth Management

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