Wealth Themes

Women and Wealth

Wealth Themes provides timely articles on a variety of wealth planning topics. This month we feature an article on women and wealth, as well as other articles that focus on family wealth management. We've also included some tax articles that will be helpful as you prepare your 2017 tax return, and plan for 2018.

Women and Wealth

This article discusses the realities faced by women as they balance their professional and personal responsibilities.

View the full article.

Having Meaningful Money Conversations With Your Partner

Having healthy money conversations with your spouse/partner is essential for the long-term success of the relationship and your finances. This article provides suggestions for having more meaningful discussions around money with your spouse/partner.

View the full article.

Estate Planning and the Modern Family

Today's families come in many different shapes and sizes. This article discusses planning considerations for a variety of family situations.

View the full article.

Fixed Income Investing – Tips on TIPS

This article is the fifth in a series by the BMO Nesbitt Burns Portfolio Advisory Team and discusses Treasury Inflation Protected Securities ("TIPS").

View the full article.

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

Tax Planning Publications

- The CRA's Foreign Reporting Requirements
- Pension Income-Splitting Provides Tax Planning Opportunities for Couples
- How Investment Income Is Taxed
- Donating Appreciated Securities
- Tax Tips for Investors

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