



Jamie Wilson

Estate and Insurance Advisor

Born and raised in Vancouver, Jamie began his career in the financial industry in 2000. He previously worked as a Senior Insurance Consultant at a major bank owned brokerage firm for 13 years, joining BMO Estate Insurance Advisory Services in 2015.

Jamie's objective is to review, analyze and provide insurance-based tax and estate planning strategies. Using a disciplined and professional approach, Jamie implements complementary concepts to a traditional investment portfolio. Specializing in providing solutions tailored for affluent investors, he offers customized strategies for individuals, as well as privately owned Canadian corporations and shareholders.

Outside of work, Jamie is an avid athlete, playing competitive hockey and enjoying the outdoor lifestyle Vancouver has to offer. Jamie is married to his wife, Laura.

Dianne Swanlund, Associate Estate and Insurance Advisor
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Dianne believes in building solid client relationships. She is a dedicated insurance professional with over ten years' experience in the financial services industry. Before joining BMO Estate Insurance Advisory Services, Dianne worked with Jamie Wilson at a full-service wealth management firm where she provided insurance planning and support services to clients. Her goal is to ensure a smooth and positive experience for clients as they explore and implement personalized tax and estate planning strategies.

A long-time resident of metro Vancouver, Dianne has been actively involved in her community, volunteering with school, community and sports organizations.

Our offering

BMO Estate Insurance Advisory Services delivers innovative and customized insurance solutions to clients through our Estate & Insurance Advisors (Financial Security Advisors in Quebec). We assess your wealth management needs and recommend insurance strategies that are designed to preserve, enhance, transfer and protect the wealth you've created. Whether you're focused on growing your investments in a tax-efficient way, leaving a legacy to your heirs, or have concerns about adequate insurance coverage, we will collaborate with your Investment Advisor to help with your estate and insurance needs.

Let's connect

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