BMO Nesbitt Burns

Wealth Management Solutions

To help you accumulate, manage and preserve personal wealth, BMO Nesbitt Burns provides a full range of wealth management services. With our in-house specialists and access to the expert resources within BMO Financial Group, we have the services and resources you need to reach your financial goals.

At BMO Nesbitt Burns, we have all of your wealth management needs covered.

Financial Planning

- Goal setting
- Cash-flow analysis
- Net worth assessment
- Investment planning
- Retirement planning
- Income and asset protection
- Estate planning
- Tax efficiency

Investment Planning

- Establishment of investment objectives
- Asset allocation strategy development
- Portfolio design and security selection
- Investment management and advice
- Selection and monitoring of investment managers
- Periodic portfolio reviews and rebalancing

Credit and Banking Strategies

- Effective credit management – mortgage, line of credit, personal and business loans
- Cash management

Retirement Planning

- Identify goals
- Evaluate expected income
- Determine additional savings needed
- At retirement, develop a tax-efficient income strategy

Protecting Your Lifestyle

- Income continuance planning (life and disability insurance)
- Develop asset protection strategies (mortgage life insurance, business continuation insurance, critical illness and long-term care insurance and insurance for estate planning).

Legacy Planning

- Assess current and potential estate value
- Determine obligations (debts, dependants, taxes and probate costs)
- Identify estate planning issues and opportunities
- Devise strategies to fund obligations and wishes

Tax Efficiency

- Review current and future tax situations
- Uncover opportunities to save taxesor defer taxation
- Develop strategies to cover future tax liabilities

Business Financial Services

- Access to Commercial Banking Specialists
- Business investment management
- Succession planning and business transfer assistance

Philanthropic Giving

- Establish a donor advised fund or private foundation.

Let's Connect

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