

Our Services

Providing professional advice and peace of mind investing since 1998



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Boris has been with BMO Nesbitt Burns serving higher net worth clients since 1998. He graduated from Dalhousie University and finished post graduate studies at the University of King's College in Halifax. He has been connected to Northumberland County for the past 25 years, putting down roots and volunteering for various community organizations. He has attained his Certified Investment Manager (C.I.M.) designation from the Canadian Securities Institute. He is an accredited Portfolio Manager.

Jennifer Perry, Administration Associate helps with the day-to-day client service and administration of our practise.

Below is a list of benefits that we offer to our clients:

- Objective feedback to clients' ideas
- Portfolio Management
- Analysis of current financial situation
- Help in articulating and prioritizing financial goals
- Help in determining risk tolerance
- A plan to reach financial goals
- A long-term partner who know our clients' situation, needs and goals
- Stock research
- Due diligence on mutual fund managers
- Analysis of new investment products
- Historical perspective/experience in many types of markets
- An education on investment and financial concepts
- Honest opinions
- A live voice on the phone during business hours
- Peace of mind
- Cash flow planning
- Retirement planning
- Education planning (RESPs)
- Tax planning
- Estate planning
- An assessment of insurance needs
- Referrals to other professionals both at BMO Nesbitt Burns and outside the organization
- A quarterly newsletter
- Sounding board for life decisions
- Quarterly portfolio and performance reporting
- Direct communication with clients' tax and legal advisors
- Online access to BMO Nesbitt Burns research
- Online access to accounts and past monthly statements through Gateway
- Commission-free trading for fee based accounts
- Wholesale prices on fixed income securities for fee based accounts
- Tax reporting
- Records of cost bases for securities
- Facilitation of charitable donations of securities
- Reorganizations
- Custody of Securities