Women and Wealth

At BMO Private Wealth, we understand women and their unique financial challenges. Let's talk about your money – on your terms.

Women approach wealth differently than men. Your experiences may affect your money mindset and priorities. For instance, your attention may be split across raising children, working, obtaining a higher education, and caring for aging parents, and you lose income when you must leave the workforce to care for others. Life transitions tend to affect women more than men, so you need to be especially proactive in preparing for all eventualities, good and bad. Though many women don't enjoy taking care of themselves financially, doing so is essential to your well-being and freedom.

At BMO Private Wealth, we believe in you, and we're here to help take the stress of financial oversight off your shoulders by providing guidance, insight and resources.

Through authentic, empathetic and meaningful discussions, we'll delve into your personal interests, life goals, current circumstances, and dreams. We'll review your financial situation, help you set priorities, provide actionable steps to address them, and regularly assess if you're still on track to achieve your goals. Best of all, we'll remain by your side to advise you at every step of your financial journey.

To help you become more confident and proactive in managing your finances, we will help you to:

- Take small, manageable steps to tackle your investment and financial situation.
- Consider your personal short-, medium- and long-term goals.
- Ensure that you will still reach your goals and can manage your financial plan if your partner passes away unexpectedly.
- Plan for expected and unexpected life events, which can have serious implications, particularly if you need to care for children or aging parents while working
- Think long-term, planning for potential health expenses as you age.
- Take control of your finances with a complete financial plan to better understand where your money is going, how much you'll need to fund your goals, how to protect yourself and the ones you love, and how long your money will last, depending on the choices you make.
- Help you get back on track if you deviate from your plan, without judgement, as we know that life can throw curve balls such as career transitions or shifts in the economy.
- Provide advice on a broad range of issues related to your financial wellbeing, working in close collaboration with a network of BMO specialists in tax, estate, trust and insurance planning, as well as private banking, to meet all your wealth management needs easily and effectively, under one roof.

For further information please speak with a BMO Private Wealth financial professional.
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