

Trusted Advice for Life

Our consultative approach

Understanding your unique needs and circumstances is at the heart of BMO's wealth management approach. Our two-way process allows you and your BMO financial professional to work together to develop and implement a customized strategy tailored to meet your goals.

Your BMO financial professional can provide you with an integrated and multi-disciplinary wealth management solution. This includes all aspects of managing, protecting and transferring wealth, including investments, insurance, tax efficiency, estate planning, retirement planning, cash management, planned giving, trusts and Wills.

Financial planning

Through a comprehensive planning approach, your BMO financial professional can take you through a financial planning process designed to provide you with clarity regarding your personal, family and financial goals.

Estate planning and tax specialists

An estate plan is a key component of your overall wealth management strategy. Your BMO financial professional can help identify planning opportunities and assist you in overcoming challenges. They can introduce you to experts who provide strategic advice that aligns with your needs, and oversee the successful implementation of your personal estate plan. With planning, you can maximize the value of your estate, minimize taxes and have control over how your estate is distributed.

Trust and executor services

Your BMO financial professional can engage experts such as BMO Trust Company to offer the unique protection and tax-savings potential of trusts. BMO Trust Company can also provide Will reviews and Will direction as part of your overall wealth plan. Executor services are also offered to help ease the burden of administering an estate.

Insurance

Asset preservation is an integral component of a comprehensive wealth plan. In partnership with a BMO Estate and Insurance Advisor (Financial Security Advisor in Quebec), your BMO financial professional can recommend insurance solutions that are aligned with your overall wealth strategy and provide a greater sense of assurance.

Asset management and investments

With access to a world of investment solutions, your BMO financial professional will recommend specific financial solutions that are tailored to your investor profile, while complementing your overall wealth management strategy.

Business succession planning

Succession planning is a process, not an event. Proper planning can ensure the ongoing stewardship of the business you have worked so hard to build. Your BMO financial professional can assist you with planning for retirement and the transition of management and ownership of your business, whether to a family member, employee or a third party.

Lending services

Whether you're looking to secure a mortgage, personal loan or line of credit – or if you require more specialized lending services to fulfill and optimize your wealth management strategy – your BMO financial professional will connect you with a BMO Bank of Montreal lending specialist.

Philanthropic services

Strategic philanthropy and charitable giving is an extension of your personal beliefs. Your BMO financial professional can help you implement a solution that will make a positive difference and have a lasting impact on your family and community.

Wealth management services

Through partnerships across BMO Financial Group, BMO Private Wealth professionals have access to a full spectrum of BMO Private Wealth resources to help address all your wealth management needs.

BMO Private Banking provides customized and innovative banking solutions through its Platinum Banking services. Your BMO financial professional can introduce you to a BMO Private Banker to discuss your banking needs.

BMO Nesbitt Burns is one of Canada's largest and most respected full-service investment firms. They offer a comprehensive set of investment and wealth management solutions.

BMO Private Investment Counsel is one of Canada's oldest and largest investment counselling firms, and is the investment division of BMO Private Banking. They offer a principles-based approach to investing with access to a robust investment platform and Investment Policy Committee.

With the knowledge and experience provided by your BMO financial professional, combined with the reputation and resources of BMO Financial Group, you can be confident that you will always be prepared and well informed to make decisions about your future.

For more information, please speak with your BMO financial professional.



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