BMO Nesbitt Burns

Trusted Advice For Life



Our Consultative Approach

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

Your Advisor can draw upon the full depth and breadth of the BMO Financial Group of Companies to 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 Advisor 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 Advisor can help identify planning opportunities and issues, as well as introduce experts to advise you on strategies that suit your circumstances 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 Advisor 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 our Estate and Insurance Advisors, your Advisor can recommend insurance solutions that will complement 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 Nesbitt Burns Advisor will recommend specific solutions that are tailored to your needs while complementing your overall wealth management strategy – everything from fee-based, managed solutions and traditional investments, to alternative investments and structured products.

BMO Wealth Management
BMO Nesbitt Burns

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 Advisor 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 Advisor will work with you to access the expertise of a BMO Bank of Montreal lending specialist.

Philanthropic Services

Strategic philanthropy and charitable giving is an extension of your personal beliefs and convictions.

Your Advisor can help you implement a solution that will have a long-term impact and enduring difference in your community and create a lasting family legacy.

The solution may be anything from a donor advised fund to the creation of a private foundation.

Private Banking Services

BMO Financial Group offers a full range of Platinum Banking solutions that can provide you and your family with highly customized and innovative products and services. Your Advisor can introduce you to a private banking professional at BMO Harris Private Banking.

BMO Nesbitt Burns is one of Canada's largest and most respected full-service investment firms. We offer a comprehensive set of wealth management solutions, backed by the country's top investment research team[1].

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

Marc Dulude, CFP®, CIM, DFP
Wealth Advisor and Financial Planner

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BMO Wealth Management
BMO Nesbitt Burns

The Marc Dulude
WEALTH ADVISORY GROUP

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