Matthew Pym

Estate and Insurance Advisor

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BMO Estate Insurance Advisory Services Inc.
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Whether you're focused on growing your investments in a tax efficient way, leaving a legacy to your heirs, or have concerns about adequate insurance coverage, I will collaborate closely with your Investment Advisor to help with all of your estate and insurance needs.

Matthew has worked in the insurance industry for over ten years and has a degree in Economics and Personal Financial Planning from Wilfrid Laurier University, as well as his Certified Financial Planner (CFP) and Chartered Life Underwriter (CLU) designations. He has a passion for problem solving and finding unique estate planning and insurance solutions for clients through a mix of analysis and his past experience working on complex cases with clients.

About Matthew

Matthew is an active volunteer and appreciates giving back to the community. He has volunteered with Big Brothers, was the Membership Chair for his local Advocis chapter, and is the former President of the Edmonton Estate Planning Council. Over the years he has been recognized with multiple awards for sales leadership and customer satisfaction, as well as the volunteer of the year award with Advocis in 2019.

In his spare time you can find him staying active outdoors with his wife and daughter skiing or curling in the winter and running or cycling in the summer.

Our Offering

BMO Estate Insurance Advisory Services delivers innovative and customized insurance solutions to clients through our Estate & Insurance Advisors (Financial Security Advisors in Quebec). We assess your wealth management needs and recommend insurance strategies that are designed to preserve, enhance, transfer and protect the wealth you've created. Whether you're focused on growing your investments in a tax-efficient way, leaving a legacy to your heirs, or have concerns about adequate insurance coverage, we will collaborate with your advisor to help with your estate and insurance needs.

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