My Services

Wealth Advice You Can Trust

I develop personalized investment plans that take into account each client's goals, risk tolerance and investment time horizon. Portfolios are continually monitored to ensure the specific needs are met in both registered and taxable accounts. I offer timely, relevant and high quality investment advice. This is possible by utilizing our partners across BMO Private Wealth. I have access to a full spectrum of resources; industry–leading equity research, world-class managers, wealth planning, business succession and BMO Nesbitt Burns Estate and Insurance Advisors.

I work with clients through various stages of their life, focusing on asset building, retirement and estate planning. Personalized financial strategies are designed to ensure clients are confident that they have an appropriate plan in place to ensure their individual and financial goals are achieved.

The most important measure of my success is the success of my clients!

Below is a list of benefits I offer to clients:

- Objective feedback to clients' ideas
- Portfolio Management
- Ongoing monitoring, discussion and implementation of required portfolio adjustments
- Regular portfolio and performance reporting
- 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 knows 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
- Cash flow planning
- Retirement planning
- 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
- 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
- Tax reporting
- Records of cost bases for securities
- Facilitation of charitable donations of securities
- Custody of Securities
- Peace of mind

Let's connect

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BMO Private Wealth

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