Our Services

Trusted Investment Advice

With more than 30 years in the investment industry, Brad Althouse has broad experience and a solid reputation in assisting individual, corporate and institutional clients. Andrew Bandler has been working with Brad for more than a decade, assisting new and existing clients.

They believe that every client deserves a dedicated and consistent level of service, tailored to their individual needs. As your Portfolio Managers and Investment Advisors, getting to know you and establishing a lasting relationship based on the highest standards of service excellence, transparency and integrity is their commitment.

Brad, Andrew and their team work together to provide exceptional service, consistent client contact and proactive solutions to meet their clients' investment needs.

Below is a list of benefits that they offer to clients::

- Portfolio Management
- Objective feedback to clients' ideas
- 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
- Wholesale prices on fixed income securities for fee based accounts
- Tax reporting
- Records of cost bases for securities
- Facilitation of charitable donations of securities
- Reorganizations
- Custody of Securities
- Peace of mind

Let's connect

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