

Ferrie Petruccelli Wealth Management Group

BMO Nesbitt Burns



Our Beliefs

Capital Preservation First – Our clients have worked a lifetime to build and sustain their wealth. Our mission is to protect it.

Relationship – Our clients view us as trusted partners in their personal and financial lives. Our purpose is to make a meaningful contribution to both.

Custom Solutions – Each client is unique. Our clients expect and receive customized portfolios tailored to their specific needs.

Emotion Free – Emotions regularly impact investment success. Our investment process is emotionless and systematically adjusts the portfolios to changing levels of risk in the markets.

Our Process

The price of all goods, investments included, is a function of supply and demand. Those goods with the strongest demand will rise in price, and the weakest will fall. We measure and rank a variety of investments, and focus the portfolios on the strongest.

As with the leading pensions and foundations, our investment universe includes Canadian, U.S, and International stocks and Exchange Traded Funds, as well as commodities, currencies, bonds, managed futures and cash. Including these choices reduces risk, downside volatility and improves returns over time.

Demand for all investments change over time. We recognize these shifts and adjust the portfolios, when appropriate, to safer assets including cash and bonds. Doing so better protects our client's wealth and delivers peace of mind.



Let's Connect

David Ferrie

Senior Portfolio Manager

Has worked with BMO Nesbitt Burns since 1987

Anthony Petruccelli, PFP®

Portfolio Manager

Has worked with BMO Nesbitt Burns since 2000

Gabriela Boada

Investment Representative

Has worked with BMO Nesbitt Burns since 1997

Our Partners

Tim Simpson

Estate & Insurance Advisor

An Insurance and Estate Advisor since 1995.

Tracy McClure

Wealth Planning Consultant

Has worked with BMO since 1991, and with BMO Nesbitt Burns since 2015.

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