

Gottesman Wealth Advisory BMO Nesbitt Burns

Let's connect

Gottesman Wealth Advisory
BMO Nesbitt Burns

Abe Gottesman, CFA, MBA
Investment Advisor, Portfolio Manager

Victoria Karkar
Administrative Assistant

1 First Canadian Place
38th Floor

M5X 1H3
Tel: 416-359-7721
Toll Free: 1-800-263-2286

www.GottesmanWealthAdvisory.com

Welcome to the Inaugural Edition

Gottesman Wealth Advisory Team newsletter

Welcome to the inaugural edition of the Gottesman Wealth Advisory Team newsletter. Being the first one, we thought we would take this opportunity to set some ground rules and manage expectations. First and foremost, as the name implies, we are not just stock pickers or investment managers. We are so much more than that. We provide comprehensive wealth advice. With the help of our in-house experts, this includes but is not limited to: advice on wills, powers of attorney, insurance, financial and tax planning - in addition to portfolio management. We would strongly encourage you to please see elsewhere on the website for additional information on these various services along with the [biographies of the specialists](#) who provide them. As well, this website is not meant to be the “go-to” place for market commentary. There are many experts who spend their entire day commenting on the markets. We do not plan to add our name to that list. We will leave it to them to try and explain the markets. We wish we knew what the markets are going to do but unfortunately, we do not have any insight whatsoever on the market movements or on the timing of the capital markets – either past or future (or present). In fact, as we write this letter, the Dow Jones Industrial Average is down more than 800 points and we had no idea this morning that it was going to happen – nor do we have any idea on what tomorrow will bring. As Abe always say, if we knew what the markets would do, we would not be spending winters in Canada! As JP Morgan famously quipped when asked what the markets would do, he responded, “either up, down or sideways” – and we couldn’t agree more!

However, we do plan on including informative articles on our website on financial planning, investment management and related topics written by various experts that we think our clients and prospects, as well as anyone else reading this website, will find to be very beneficial and value-added. As well, this website is meant to be the place to go to periodically for interesting thoughts on investing related topics that we will discuss on our newsletters.

As for our “bread and butter” or investment style or philosophy is relatively simple. It can best be described as an unwavering dedication to a consistent investment process while striving to provide exceptional client service. The strength of our investment philosophy is built on a long-term perspective and a commitment to investing in quality businesses. We believe these quality companies possess sustainable competitive advantages, creating value as profitable businesses that can, over time, provide attractive returns with less risk than the overall market. Or, as Warren Buffett stated, “Only four things really count when making an investment: A business you understand, favourable long-term economics, able and trustworthy management and a sensible price tag”. That’s investment, everything else is speculation.

In closing, we would encourage you to check back from time to time for new postings on this site. In the meantime, if you have any suggestions on how we can improve the website, or if there is any financial planning or investment related topic you would like to learn more about, feel free to reach out to our team. Perhaps we will make it the focus of our next newsletter! We look forward to hearing from you.



Gottesman
Wealth Advisory

BMO Wealth Management is the brand name for a business group consisting of Bank of Montreal and certain of its affiliates, including BMO Nesbitt Burns Inc., in providing wealth management products and services. © “BMO (M-bar roundel symbol)” is a registered trade-mark of Bank of Montreal, used under licence. \® “Nesbitt Burns” is a registered trade-mark of BMO Nesbitt Burns Inc. BMO Nesbitt Burns Inc. is a wholly-owned subsidiary of Bank of Montreal. If you are already a client of BMO Nesbitt Burns, please contact your Investment Advisor for more information. The opinions, estimates and projections contained herein are those of the author as of the date hereof and are subject to change without notice and may not reflect those of BMO Nesbitt Burns Inc. (“BMO NBI”). Every effort has been made to ensure that the contents have been compiled or derived from sources believed to be reliable and contain information and opinions that are accurate and complete. Information may be available to BMO Nesbitt Burns or its affiliates that is not reflected herein. However, neither the author nor BMO NBI makes any representation or warranty, express or implied, in respect thereof, takes any responsibility for any errors or omissions which may be contained herein or accepts any liability whatsoever for any loss arising from any use of or reliance on this report or its contents. This report is not to be construed as an offer to sell or a solicitation for or an offer to buy any securities. BMO NBI, its affiliates and/or their respective officers, directors or employees may from time to time acquire, hold or sell securities mentioned herein as principal or agent. BMO NBI will buy from or sell to customers securities of issuers mentioned herein on a principal basis. BMO NBI, its affiliates, officers, directors or employees may have a long or short position in the securities discussed herein, related securities or in options, futures or other derivative instruments based thereon. BMO NBI or its affiliates may act as financial advisor and/or underwriter for the issuers mentioned herein and may receive remuneration for same. A significant lending relationship may exist between Bank of Montreal, or its affiliates, and certain of the issuers mentioned herein. BMO NBI is a wholly owned subsidiary of Bank of Montreal. Any U.S. person wishing to effect transactions in any security discussed herein should do so through BMO Nesbitt Burns Corp.

BMO Nesbitt Burns Inc. is a Member - Canadian Investor Protection Fund. Member of the Investment Industry Regulatory Organization of Canada.