Lydia Potocnik, LL.B, TEP

Vice-President, Philanthropic Advisory Services at BMO Wealth Management

"By taking the time to understanding each clients' unique goals and objectives, I work with them to ensure that their philanthropic goals are realized and integrated into their larger wealth and estate plan."

About Lydia

Lydia assists affluent clients in building a philanthropic legacy by taking a strategic approach. She guides families through the unique opportunities and strategies that exist to create a legacy that is meaningful and lasting. Her estate planning and trust administration background allow her to also ensure that clients' philanthropic goals are part of their larger wealth and estate plan. Having worked with both clients and beneficiaries of estates, Lydia's approach to planning takes into consideration unique family dynamics and conflict resolution.

Experience & background

Lydia joined BMO Wealth Planning in 2011 as a Will & Estate Planning Consultant working with clients on all aspects of their estate and trust planning. She then assumed a leadership role with BMO Trust Company where she was responsible for overseeing all aspects of the estate and trust administration business in Ontario. Prior to joining BMO, Lydia led a very successful philanthropy program at a major hospital foundation where she advised donors on how to build a lasting philanthropic legacy. She has contributed to numerous publications and media appearances related to her work.

Education & credentials

- Bachelor of Arts, University of Toronto
- Bachelor of Laws, Windsor Law School
- Society of Estate and Trust Professionals (TEP)
- Called to the Ontario Bar
- Certificate in Elder Law, Osgoode Law School
- Member of the Board of Directors at St. Joseph's Healthcare Foundation, Hamilton

What sets us apart

Using a holistic approach, Lydia collaborates with her colleagues in BMO Wealth Management to help clients clearly articulate their personal wealth goals. Together, we provide a multi-dimensional perspective that offers a valuable complement to our clients' other professional counsel. Lydia's goal, as part of the BMO Wealth Planning team, is to empower clients with comprehensive and customized solutions, resolving complex situations through coordinated and proactive wealth plans.

Expertise
Commitment
Collaboration

BMO Wealth Planning

We are a dedicated team of highly disciplined Tax, Estate & Trust, Financial Planning, Business Advisory and Philanthropic professionals. Planning focused, our solutions are informed by insight, experience and a commitment to help clients realize their aspirations, at all stages of life.

Let's connect

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