BMO Wealth Planning Group

Rebecca Clark, CPA, CA, CDFA

Director, Wealth Planning at BMO Wealth Management

"I offer clients the ability to create and implement solutions to achieve their personal financial objectives, by taking the time to understand their unique situation and help them to simplify the complexities of wealth."

About Rebecca

Rebecca is passionate about helping people become more knowledgeable and confident about their finances. She enjoys providing clients with clarity and direction on their financial road forward, by integrating the knowledge of our in-house technical specialists into a simple and straightforward plan. Clients benefit from a tailored wealth plan, often resulting in reduced stress and anxiety knowing that a team of professionals is helping them meet their financial goals.

Experience & background

Rebecca joined BMO Wealth Management in November 2017. Prior to that she spent 7 years working in public accounting, encompassing the areas of personal and corporate taxation, corporate restructuring, financial mediation and divorce finances, tax and wealth planning. Additionally she has spent time in the manufacturing and service sectors in finance roles, and started her career with a 'big 4' accounting firm.

Education & credentials

- Chartered Professional Accountant (CPA, CA)
- Certified Divorce Financial Analyst (CDFA)
- Honours Bachelor of Commerce, McMaster University (BComm)
- CPA Canada In-Depth Tax Course, Part 1

What sets us apart

Using a holistic approach, Rebecca 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.
Rebecca'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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We're here to help.

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