BMO Wealth Planning Group

John Waters, CPA, CA, CFP®, TEP

Vice President, Director of Tax Consulting Services at BMO Wealth Management

"Collaborating closely with clients, my goal is to meet their diverse objectives, working to translate meaningful conversations into actionable ideas – based on an acute understanding of their unique concerns, family dynamics and business structures."

About John

John has strategic oversight of the Tax Consulting team, seasoned tax specialists who support BMO Wealth Management Advisors and their clients by advising high net worth professionals and families on practical and informed tax and estate solutions. Drawing on more than two decades of tax planning expertise, he acts as a trusted resource, leading high-level planning discussions, presenting tax seminars and writing timely commentaries on emerging developments in his field. Goal-oriented, John motivates his team to provide a fresh perspective, helping clients fulfill their wealth aspirations.

Experience & background

John joined BMO Wealth Management in 2007, following 13 years at international accounting firm PricewaterhouseCoopers, where he led a team of tax professionals in the High Net Worth Planning Group in downtown Toronto. He specialized in a broad range of tax and estate planning issues, including personal, corporate (public/private), trusts, partnerships, international and cross border, not-for-profit tax planning and assisted in the design of executive compensation plans. John is recognized as a prominent subject matter expert and spokesperson on tax and estate planning for national print and online media, and has also consulted on developing Canadian tax legislation.

Education & credentials

- Chartered Professional Accountant (CPA)
- Certified Financial Planner® (CFP®)
- Trust and Estate Practitioner (TEP)

What sets us apart

Using a holistic approach, John collaborates with his colleagues across 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.

John'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

John Waters
Direct: **416 359-7085**
john.waters@bmonb.com
linkedin.com/in/johnwwaters

1 First Canadian Place
42nd Floor
Toronto, Ontario, M5X 1H3

bmo.com/wealth
We're here to help.

BMO Wealth Management
We're here to help.™