Linda Leung, CPA, TEP

Director of U.S. Tax Planning at BMO Wealth Management – Cross-Border Professional

"My breadth of specialized knowledge, along with my interpersonal skills and unique ability to filter complex concepts into informed, practical strategies designed to maximize wealth, position me as a trusted, value-add resource for my clients."

About Linda

Linda advises high net worth business owners and professionals on how to efficiently structure their U.S. and Canadian assets, providing specialized tax solutions as part of an integrated wealth planning team. Drawing on 25 years of leadership within the cross-border field, Linda's clients benefit from in-depth technical expertise, facilitating high-level planning discussions, while addressing a wide range of situations across U.S. income and estate tax, and Canadian income tax considerations.

Experience & background

Linda joined BMO Wealth Management in 2010, following 10 years of leading a global tax team at a large consulting firm, where she specialized in individual tax considerations with regards to employees relocating permanently or temporarily from/to U.S. and Canada. Previously, she was a Tax Manager in the Small Business and International Assignment Services groups at PricewaterhouseCoopers, a large international accounting firm.

Education & credentials

- CPA, TEP
- Member of the American Institute of Certified Public Accountants (AICPA)
- Member of the Society of Trust and Estate Practitioners (STEP)

What sets us apart

Using a holistic approach, Linda collaborates with, and supports her 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.

Linda'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

Linda Leung
Direct: 416 359-7097
linda.leung@bmonb.com
linkedin.com/in/laleung

1 First Canadian Place
39th Floor
Toronto, Ontario, M5X 1H3

BMO Wealth Management
We're here to help.™

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