

Wealth Themes

BMO Private Wealth | April 2023

Wealth Themes provides timely articles on a variety of wealth planning topics. This month we feature articles to assist you with transferring your wealth, as well as a review of the proposed measures in the 2023 Federal budget.

The Great Wealth Transfer is Coming discusses how to protect and properly pass down your assets.

[View the full article.](#)

Why Trusts Are an Essential Tool for Wealthy Families

provides considerations for using these structures to maintain control over legacy goals and distributing assets to family members.

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Transferring Your Business to the Next Generation

explains how an “estate freeze” can be an effective strategy when transferring wealth or implementing a succession plan.

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2023 Federal Budget Review highlights the significant proposed measures affecting individuals and private companies.

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2023 Federal Budget Implications for Canadian Private Companies focuses on important proposed measures that affect businesses.

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Please don't hesitate to contact the office if you have any questions about these articles.

