McKenna Gibbons Wealth Management Group

Focusing on financial partnerships committed to details, discipline and experience

At BMO Nesbitt Burns, we have all of your wealth management needs covered.

Financial Planning

- Goal setting
- Cash-flow analysis
- Net worth assessment
- Investment planning
- Retirement planning
- Income and asset protection
- Estate planning
- Tax efficiency

Investment Planning

- Establishment of investment objectives
- Asset allocation strategy development
- Portfolio design and security selection
- Investment management and advice
- Selection and monitoring of investment managers
- Periodic portfolio reviews and rebalancing

Credit and Banking Strategies

- Effective credit management – mortgage, line of credit, personal and business loans
- Cash management

Retirement Planning

- Identify goals
- Evaluate expected income
- Determine additional savings needed
- At retirement, develop a tax-efficient income strategy

Protecting Your Lifestyle

- Income continuance planning (life and disability insurance)
- Develop asset protection strategies (mortgage life insurance, business continuation insurance, critical illness and long-term care insurance and insurance for estate planning).

Legacy Planning

- Assess current and potential estate value
- Determine obligations (debts, dependants, taxes and probate costs)
- Identify estate planning issues and opportunities
- Devise strategies to fund obligations and wishes

Tax Efficiency

- Review current and future tax situations
- Uncover opportunities to save taxes or defer taxation
- Develop strategies to cover future tax liabilities

Business Financial Services

- Access to Commercial Banking Specialists
- Business investment management
- Succession planning and business transfer assistance

Philanthropy

- Establish a donor advised fund or private foundation

Let's connect

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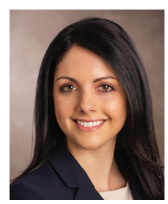

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