

A one-team approach that starts with your personalized wealth plan



Wealth enables unique opportunities and advantages. But it also comes with responsibility and complexity. At BMO Private Wealth, we challenge individuals and families to take action on what's important to drive exceptional outcomes today and through times of transition.

Coordinated services and confident execution

Our professionals are dedicated to making the often overwhelming pressures of managing wealth more manageable. They ask thought-provoking questions, help you to take stock of your financial position, discover what's most important to you and your family, and provide solutions and support that allow you to act quickly to ensure your wealth is protected and put to the best use.

Expect exceptional outcomes

- A highly customized approach to growing and preserving your wealth
- A well-structured and dynamic investment portfolio
- Tailored family and business trust structures
- Family money management education
- Simplification of monthly bill payments and review of financial statements
- Charitable giving strategies
- An estate plan that aligns with your goals
- Resolution of difficult emotional issues related to wealth

Private Banking

If you value exceptional personal service – whether your banking and financial needs are straightforward or complex – then BMO Private Banking services were designed for you.

You are served by a dedicated team skilled in handling the finances of affluent Canadian families and professionals. With an exclusive client list, your wealth professional is available to you and has the time to focus on your particular needs and be proactive around them.

As well, other specialists from throughout BMO Financial Group can be called into play when needed. Private Banking is designed to simplify your most complex banking requirements and provide you with the best banking service possible. Your wealth professional and a dedicated client support team will partner with you to choose and manage your banking services and wealth management solutions.

Investment management

Helping you achieve your personal and professional financial goals is our focus. We combine our extensive wealth management experience with a highly customized approach to growing and preserving your wealth.

We manage your investments in a manner that reflects your wishes and needs, and apply a prudent and disciplined approach that emphasizes risk management. Your dedicated wealth professional, backed by a team of specialists, and your own investment plan ensure that your unique financial needs take top priority and that you are free from having to make day-to-day investment decisions.



Trust & Estate Services

Effective trust and estate administration is the surest way to safeguard your prosperity for the future and to ensure a smooth and orderly transition to your heirs. BMO Trust Company offers a complete range of trust and estate services. You choose how you want to work with us.

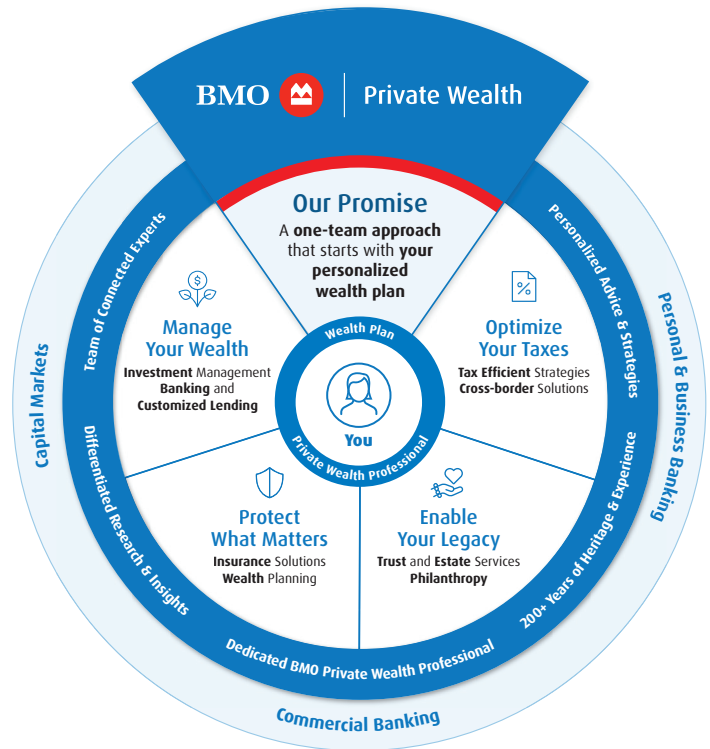
Where BMO Trust Company acts as an executor, we ensure that estates are administered impartially, prudently, efficiently and with a high level of confidentiality. Our Agent for Executor services offer convenience, peace of mind, and support where you have been named as an executor of an estate.

BMO Trust Company can act as a trustee, providing professional administration of personal and purpose trusts – whether established during your lifetime or through your Will.

Complete wealth planning

Balancing the intricacies of your financial landscape requires more than just advice – it demands a tailored strategy that aligns with your unique aspirations. BMO Private Wealth offers you a comprehensive array of services designed to harmonize your wealth aspirations. From risk management and tax planning to estate planning, trust management, business succession, retirement planning, and philanthropic giving – each element is carefully woven into a personalized plan for lasting financial security.

- Insurance & risk management
- Tax Planning
- Estate Planning
- Trust Management
- Business Succession & Family Governance
- Retirement Planning
- Philanthropic Giving



Let's connect

At BMO Private Wealth, we believe that we have an unmatched ability to deliver a customized private banking and wealth management solution to you and your family – whether you are working or living in Canada or the U.S. Contact us to arrange to speak with someone in your community.

www.bmo.com/privatewealth



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