

Wealth Themes

Death and Taxes – Life's Only Certainties

As Benjamin Franklin once said, 'The only certainties in life are death and taxes.' While both events are inevitable, a comprehensive estate plan can help ensure your estate transfers to your beneficiaries in an efficient manner, according to your wishes. In this issue, we provide information about recent tax changes that could impact your estate planning, as well as BMO resources to help you implement your estate plan.

Cherry Picking Succession Law, European Union Style

With increased globalization, family wealth often spans multiple countries and continents. The European Union Succession Law came into effect last year to help alleviate the difficulties and unintended results faced by individuals with multi-jurisdictional citizenship and residency, with respect to the succession of their assets in Europe.

 [View the full article.](#)

Good Reasons to Trust Testamentary Trusts

New legislation took effect on January 1, 2016 impacting the taxation of testamentary trusts; however, they remain an important and effective estate planning tool.

 [View the full article.](#)

BMO Trust Company – Corporate Executor and Trustee Services

Depending on the circumstances and the complexity of your estate, the responsibilities of an executor and trustee can be demanding and time consuming. Naming a professional to oversee these duties can provide you with peace of mind that your estate plan will be efficiently carried out as you intended.

 [View the full article.](#)

BMO Nesbitt Burns Estate Information Organizer

Many people have their own method for storing important financial records and documents. However, if someone else were to step into your shoes, would they be able to locate this information? The Estate Information Organizer helps to capture the location of important documents and other information; making it a valuable resource for you, your family, and your executor or Power of Attorney for Property.

 [View the full article.](#)

Please don't hesitate to contact the office if you have any questions about these articles, or would like to discuss your portfolio.

Featured Publications

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