

Our Services

Thoughtful Investment Solutions

Shelley is a wealth management and investment professional with over 25 years experience in the financial services industry. Clients and their families receive a comprehensive investment experience delivered through sound investment advice, thoughtful estate planning, and customized insurance solutions.

She is a Fellow of the Canadian Securities Institute, and has earned several industry designations including the Canadian Investment Manager (CIM) and Certified Financial Planner (CFP).

Beth Primeau, Investment Representative helps with the day-to-day client service and administration of our practice.



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Below is a list of benefits that we offer to our clients:

- Objective feedback to clients' ideas and concerns
- Portfolio Management
- Analysis of current financial situation
- Help in articulating and prioritizing financial goals
- Help in determining risk tolerance
- A plan to reach financial goals
- A long-term partner who know our clients' situation, needs and goals
- Equity research
- Due diligence on mutual fund managers
- Analysis of new investment products
- Historical perspective/experience in many types of markets
- An education on investment and financial concepts
- Honest opinions
- A live voice on the phone during business hours
- Peace of mind
- Cash flow planning
- Retirement planning
- Education planning (RESPs)
- Tax planning
- Estate planning
- An assessment of insurance needs
- Referrals to other professionals both at BMO Nesbitt Burns and outside the organization
- A quarterly newsletter
- Sounding board for life decisions
- Quarterly portfolio and performance reporting
- Direct communication with clients' tax and legal advisors
- Online access to BMO Nesbitt Burns research
- Online access to accounts and past monthly statements through Gateway
- Commission-free trading for fee based accounts
- Wholesale prices on fixed income securities for fee based accounts
- Tax reporting
- Records of cost bases for securities
- Facilitation of charitable donations of securities
- Reorganizations
- Custody of Securities