Wealth Advice You Can Trust

As a Wealth Advisor, I work closely with clients, sharing my expertise and advice to help you successfully realize your investment goals.

My conservative approach and emphasis on managing risk is why I believe *"that asset mix selection is the foundation of long term financial success."*

I have built my business through working with High Net Worth clients and it is a privilege to be entrusted with the management of my clients' wealth.

My Mission is to provide clients with wealth-management services based on experience, integrity and loyalty.

The Wealth Advisory Approach

We're here to help with all your financial priorities at every stage of your life. We proudly work hard at providing services that encompasses all aspects of wealth management: investment planning, wealth advisory, retirement planning, preferred plus banking, business planning, estate and insurance services, tax planning and annual tax preparation assistance.

Jeff's Best Practices

"I believe that High Net Worth clients deserve High Net Worth Service."

As a Wealth Advisor, I believe that asset mix selection is the foundation of long term financial success. Managing my client expectations and emotions are very important to achieving our long term plans.

Service, Service, Service...

- **Reviewing Gain/Losses in December** every year provides significant savings to client's tax bills.
- **"The Report Card"** - Providing meaningful annual portfolio reviews in January allows clients to have a clear understanding of how they have performed in the calendar year. This is also a good process to make sure our target asset mix is correct.
- **Preparing Personalized Tax Packages** that are ready for accountants alleviates the stress on clients and makes the clients experience much better.
- **Offering Preferred Plus Banking** - We have the ability and tools to have clients monthly bills paid through us at BMO Nesbitt Burns. This banking offering is very beneficial to senior clients who like a fully managed investment and banking experience.

Let's connect

Jeff Treptow
Wealth Advisor

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Our Team

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Jeff's career as an Investment Advisor has spanned over nearly 20 years. He spent most of his life in the Nation's Capital and is a Carleton University graduate. He began his career in Ottawa as an Investment Advisor with CIBC Wood Gundy and moved to Kingston in 2001 to join BMO Nesbitt Burns. Since joining BMO Nesbitt Burns, Jeff has built a very successful business and achieved his Wealth Advisor designation in 2011.

As a Wealth Advisor, Jeff works closely with clients, sharing his expertise and advice to help them successfully realize their investment goals. His conservative approach and emphasis on managing risk is why Jeff believes *"That asset mix selection is the foundation of long-term financial success."* Jeff has built his business through working with high net worth clients. He and his team continue to provide an exceptional value added client service experience. Jeff, together with his wife Kelly and their two children are proud to call Kingston and the Thousands Islands their home.

Gina Davis
Investment Representative, BMO Nesbitt Burns

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Gina joined BMO Nesbitt Burns in 2001. She has completed the Canadian Securities Course required for her role and continues her professional development with additional coursework. Her work ethic and experience allow her to provide the best-of-class information and support to Jeff's clients. Gina is a graduate of St. Lawrence College and is the mother of two wonderful daughters.

Our Partner

Phil Comtois
Vice President, Estate & Insurance Advisor, BMO Estate Insurance Advisory Services Inc.

Phil has been in the estate planning and insurance industry for more than 20 years, and since 1998 with BMO Nesbitt Burns. He provides comprehensive advice for all personal estate, corporate estate, insurance and retirement needs. His areas of expertise include estate creation and preservation techniques and corporate financial security planning, all with an emphasis on the elimination of taxes.

Phil works in conjunction with Investment Advisors by facilitating the planning process and coordinating clients' other advisors, including lawyers and accountants. Responsible for the Eastern Ontario region, Phil lives in Ottawa and is fluently bilingual.

BMO Wealth Management
BMO Nesbitt Burns

Jeff Treptow Wealth Advisor