Wealth Advice You Can Trust

Background

I have over 20 years of experience in the financial services industry helping individuals, families, business owners, entrepreneurs and professionals achieve their financial goals.

I strive to provide best in class integrated wealth management services covering all aspects of client's wealth needs. Integrity, trust, accountability and exceptional services are the foundation of my practice.

BMO Nesbitt Burns

BMO Nesbitt Burns is a full-service investment advisory firm owned and backed by the heritage, stability and resources of BMO Financial Group.

Wealth Management Approach

Discovery

The wealth you have created enables unique opportunities but at the same time involves complexity and responsibility. I spend considerable time in understanding your goals, dreams and challenges, to clarify what matters to you most and follow a disciplined investment process for achieving those goals.

Goals

By identifying your goals and priorities, I can anticipate your needs and present customized solutions.

Simplify: help manage the complexity of wealth and developing strategies to achieve your objectives.

Grow: develop a personalized strategy to grow your wealth.

Protect: help protect your wealth and your legacy.

Transition: help manage lifelong transitions.

Services

With the help of my specialized wealth advisory team, I will provide you with creative solutions tailored to your unique objectives. These will include:

Wealth Planning: by understanding your priorities, I will build a flexible wealth plan, help you put that in action and fine tune it as your life evolves.

Investment Management: design an investment portfolio that fits your life style now and your plans for the future. Focus on an investment policy statement and investment proposal which reflects your risk and return objectives. Regular reviews of the portfolio and its performance is done.

Trust and Estate Planning: assist you with estate planning, to help transfer your wealth to the next generation.

Tax Planning: help with tax efficient financial strategies.

Business Succession: help transition the management and ownership of your business as per your wishes.

Philanthropy: help create a lasting legacy for your family and charity.

Let's connect

Iqbal Hussain, CFA, MBA, CFP, FCSI
Investment Advisor

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Our Team

Iqbal Hussain
Investment Advisor

Iqbal works with clients to identify their risk tolerance, income needs, long term goals and implement long term investment strategy. The process involves setting asset allocation, portfolio construction and security selection in order to achieve desired risk-return objectives.

Professional Designations: Chartered Financial Analyst (CFA), Certified Financial Planner (CFP), Fellow of CSI (FCSI), Financial Management Advisor (FMA), Registered Retirement Consultant (RRC).

Education: MBA, University of Allahabad, India; MS from Seattle Pacific University, USA

Marilynn Thivierge
Investment Representative

Marilynn has over 30 years of customer service and business experience, joining BMO Nesbitt Burns in February 2015. She co-ordinates all administrative matters concerning the operation of client accounts.

Designations: Canadian Securities Course (CSC), Conduct and Practises Handbook (CPH)

Education: BSc Honours, Trent University

Our Partners

Louis-Philippe de Sève-Bergeron
Director, Tax Planning, BMO Private Wealth

Louis-Philippe aims at providing information and guidance relevant to the complex tax environment individuals and businesses live in today. Louis-Philippe, a lawyer holding a Master of Taxation and the Tax and Estate Practitioner (TEP) designation, has worked extensively on corporate reorganizations and restructuring, estate planning, and establishment of trusts.

Karen Gowdy
Estate & Insurance Advisor, BMO Nesbitt Burns Financial Services

Karen has more than 30 years of experience in the financial services and insurance industry. She works with our team to review a broad range of financial issues important to every client. She works in the disciplines of estate, insurance and tax planning.

Carol Willes
Director, Will & Estate Planning, BMO Private Wealth

Carol, a lawyer, assists high net worth clients from many backgrounds to understand their present and to develop their future legacy. By helping clients focus on what is most important to them-family, philanthropy, security and more-she develops unique estate planning options as part of an integrated team of wealth planning specialists that support clients through their life journey.

BMO | Private Wealth

Iqbal Hussain
INVESTMENT ADVISOR
BMO Nesbitt Burns