Wealth Advice You Can Trust

Background

I have over 20 years' experience in the financial services industry helping individuals, families and businesses achieve their financial goals.

My vision is to provide highly professional financial advisory and wealth management services to accomplish their life goals. My vision reflects my values – building trust with integrity, excellence and accountability.

I joined BMO Nesbitt Burns as an Investment Advisor to leverage the firm's legacy of investment research and commitment to wealth planning.

BMO Nesbitt Burns

BMO Nesbitt Burns is a full-service investment advisory firm owned by the Bank of Montreal, Canada's oldest bank founded in 1817. BMO Nesbitt Burns has been helping Canadians achieve their investment goals since 1912.

Investment Process

Successful investing begins with establishing a financial plan to make sure you are going to reach your investment goals.

After establishing a plan there are five tenants to achieving success:

1. **Risk is personal.** I will work with you to assess the amount of risk you should take in your investment portfolio to achieve your goals.
2. **Maintain discipline.** I will help you establish an investment discipline, but more importantly I will work with you to establish a savings discipline if you are planning for retirement or a cash flow discipline if you are enjoying retirement.
3. **Understand Fees.** You should know the fees that you pay. You should also understand the detrimental effect high fees can have on long-term results. I will explain our fees to you in writing before we begin to work together and our fees are itemized on your portfolio statements.
4. **Do not chase the index.** My emphasis on quality is an attempt to manage volatility. An unintended consequence of this is portfolios that pay above average dividends yield and are not representative of the index.
5. **Leverage the power of investment experts.** – BMO Nesbitt Burns has a Wealth Advisory Group who I can draw on to advise on financial planning, estate planning, insurance, business succession planning and philanthropy or to provide solutions for whatever challenges life may bring your way.

Let's connect

Iqbal Hussain
Investment Advisor

BMO Nesbitt Burns
67 Brock Street
Kingston, ON K7L 1H5

Tel: 613-547-5750
Toll Free: 1-800-558-4696
Fax: 613-547-9347

www.iqbalhussain.ca
Iqbal1.hussain@nbpcd.com

Continued

Our Team

Iqbal Hussain
Investment Advisor

Iqbal is responsible for determining the savings or cash flow strategy and the investment strategy. This involves setting asset mix, the creation of the portfolio and regular review and updating of performance and portfolio changes.

Professional Designations: Certified Investment Manager (CIM), CERTIFIED FINANCIAL PLANNER® (CFP®), Fellow of CSI (FCSI), Financial Management Advisor (FMA) and Registered Retirement Consultant (RRC)

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

Experience: 21 years in the financial services industry.

Kaitlin Delahunt
Administrative Assistant

Kaitlin assists Iqbal with all administration matters including, account setup, account transfers and the movement of cash to bank accounts.

Professional Designations: Canadian Securities Course (CSC)

Education: Degree of Business Administration, Laurentian University

Experience: 2 years in the financial services industry.

Our Partners

Ahmad Bakhshai
Director, Wealth Planning, BMO Wealth Management

Ahmad advises high net worth families and business owners on holistic wealth management solutions as part of a team of Wealth Planning Consultants and technical specialists. Drawing on his extensive industry experience and knowledge, and the collective technical proficiency of the specialists, Ahmad facilitates a superb client experience that delivers customized solutions that address the unique and complex needs of high net worth clients. Ahmad's team often collaborates with the clients' accountants and lawyers in developing the wealth plans that address retirement, tax, trust & estate, business succession, and philanthropic planning.

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.

BMO Wealth Management
BMO Nesbitt Burns

IQBAL HUSSAIN
INVESTMENT ADVISOR