Our Services

Trusted Investment Advice

With more than 30 years in the investment industry, Brad Aulthouse is experienced in developing personalized investment plans that take into account each client's goals, risk tolerance and investment time horizon. Client portfolios are continually monitored to ensure their specific needs are met in both RSP and taxable accounts. He has broad experience and a solid reputation in assisting individual, corporate and institutional clients. Brad offers timely, relevant, high quality investment advice. This is possible by taking advantage of BMO Nesbitt Burns industry-leading equity research. Additionally, as Portfolio Managers, Brad and Andrew offer the simplicity and convenience of discretionary portfolio management.

His team consists of Andrew Bandler, Portfolio Manager, Beth Primeau, Investment Representative and Donna Davies, Marketing Assistant. They work together to provide exceptional service, consistent client contact and proactive solutions to meet their clients' investment needs.

Below is a list of benefits that they offer to clients:

- Portfolio Management
- Objective feedback to clients' ideas
- Ongoing monitoring, discussion and implementation of required portfolio adjustments
- Regular portfolio and performance reporting
- 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 knows our clients' situation, needs and goals
- Stock 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
- Cash flow planning
- Retirement planning
- 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
- 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
- Peace of mind

Let's connect

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