

# Magnus Aaserud, CPA, CA, CFP

Director, Wealth Planning at BMO Wealth Management



*“By taking the time to listen carefully to each client, I help them define their goals and objectives, while integrating this information into a customized wealth plan that addresses their current and future needs.”*

## About Magnus

Magnus is passionate about providing high net worth individuals, families and business owners with comprehensive financial planning advice and solutions, including cash flow and retirement needs analysis, tax planning strategies, risk management, philanthropy and estate planning. Drawing on his experience in tax and public accounting, his clients benefit from a depth of insight and unique foresight into a diverse range of situations, facilitating actionable recommendations.

## Experience & background

Magnus joined BMO Wealth Management in 2016. Prior to this role he was an accountant with KPMG for 7 years, including the last 4 years as a tax specialist. Magnus has experience with a wide variety of tax issues, including personal, corporate, trust, and non-resident tax.

## Education & credentials

- Bachelor of Business Administration (BBA) with a major in Financial Services and Accounting
- Chartered Professional Accountant (CPA), Chartered Accountant (CA)
- Certified Financial Planner (CFP)
- CPA In-Depth Tax Course

## What sets us apart

Using a holistic approach, Magnus collaborates with his colleagues in BMO Wealth Management to help clients clearly articulate their personal wealth goals. Together, we provide a multi-dimensional perspective that offers a valuable complement to our clients' other professional counsel. Magnus's goal, as part of the Enterprise Wealth Planning team, is to empower clients with comprehensive and customized solutions, resolving complex situations through coordinated and proactive wealth plans.

Expertise  
Commitment  
Collaboration

## Enterprise Wealth Planning

We are a dedicated team of highly disciplined Tax, Estate & Trust, Financial Planning, Business Advisory and Philanthropic specialists. Planning focused, our solutions are informed by insight, expertise and a commitment to help clients realize their aspirations, at all stages of life.



Let's connect

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