

An estate plan is an essential component of your overall wealth management strategy. A comprehensive estate plan includes having an up-to-date Will that appoints an executor (referred to as a liquidator in Quebec) to make sure that your plan is properly carried out after your death. In addition, trusts are often used in an estate plan to provide asset protection, manage assets after your death and implement other planning goals.

Depending on your circumstance and the complexity of your estate, you may want to consider appointing a corporate executor in your Will and naming a corporate trustee for any trusts established upon your death. These roles can be demanding and time consuming, and naming a professional to oversee these responsibilities can provide you with peace of mind that your estate plan will be carried out as you intended. The article, [BMO Trust Company – Corporate Executor and Trustee Services](#), explains the responsibilities of each role, important considerations when selecting an executor and/or trustee, and the benefits of using the corporate executor and trustee services available to you through BMO Trust Company.

Please contact our office if you have any questions about BMO Trust Company's executor and trustee services or would like to discuss your estate plan.

Sincerely,

[Ferrie Petruccelli Wealth Management Group](#)

David Ferrie, Portfolio Manager, Managing Director  
T: 416-590-7667 [david.ferrie@nbpcd.com](mailto:david.ferrie@nbpcd.com)

Anthony Petruccelli, Portfolio Manager, Financial Planner  
T: 416-590-7675 [anthony.petruccelli@nbpcd.com](mailto:anthony.petruccelli@nbpcd.com)

Gabriela Boada, Investment Representative  
T: 416-590-7637 [gabriela.boada@nbpcd.com](mailto:gabriela.boada@nbpcd.com)

Tim Simpson, Estate & Insurance Advisor  
T: 416-359-7798 [timothy.simpson@nbpcd.com](mailto:timothy.simpson@nbpcd.com)



The comments included in this publication are not intended to be a definitive analysis of tax applicability or trust and estates law. The comments contained herein are general in nature and professional advice regarding an individual's particular tax position should be obtained in respect of any person's specific circumstances.

BMO Wealth Management is the brand name for a business group consisting of Bank of Montreal and certain of its affiliates, including BMO Nesbitt Burns Inc., in providing wealth management products and services. ®"BMO (M-bar roundel symbol)" is a registered trade-mark of Bank of Montreal, used under licence. ® "Nesbitt Burns" is a registered trade-mark of BMO Nesbitt Burns Inc. BMO Nesbitt Burns Inc. is a wholly-owned subsidiary of Bank of Montreal. If you are already a client of BMO Nesbitt Burns, please contact your Investment Advisor for more information. BMO Nesbitt Burns Inc. is a Member-Canadian Investor Protection Fund. Member of the Investment Industry Regulatory Organization of Canada.