

Our Services

Wealth Advice You Can Trust

Diane Mehagan joined BMO Nesbitt Burns April 2004, after 30 years of service with BMO Bank of Montreal. She is experienced in developing personalized investment plans that take into account each client's goals, risk tolerance and investment time horizon. Clients' portfolios are continually monitored to ensure the specific needs are met in both registered and taxable accounts. Diane offers timely, relevant, high quality investment advice. This is possible by utilizing BMO Nesbitt Burns industry-leading equity research and through our BMO Nesbitt Burns Managed Assets Group which provides access to world-class managers. She works with clients through the various stages of their life, such as asset building, retirement and estate planning. Personalized financial strategies are designed to ensure clients are confident that they have an appropriate plan in place to ensure their individual and financial goals are achieved.

Her team consists of Mark Moulson, Estate & Insurance Advisor and Clara Castellani Neves, Administrative Assistant. They work consistently to provide exceptional service, continual client contact and proactive solutions to meet all of their client's needs.

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

- Objective feedback to clients' ideas
- Portfolio Management
- 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
- Tax reporting
- Records of cost bases for securities
- Facilitation of charitable donations of securities
- Custody of Securities
- Peace of mind



Let's connect

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