

Lisa J. Finden BSc, MTI

Associate Director, Trust Services at BMO Private Banking



"I am an advocate for our senior clients and strive to provide peace of mind by managing their day-to-day financial matters and ensuring a sound plan is in place for their protection and legacy."

About Lisa

As an Associate Director, Trust Services and a key member of the Wealth Management team, Lisa works with individuals and families to simplify their complex matters. Lisa manages Estate and Trust accounts with a specialization in enCircle Services, overseeing financial, lifestyle and well-being solutions. She is well-versed in related fields and often works in tandem with client's own legal and accounting advisors.

Lisa is a six time Platinum award winner with BMO Private Banking, demonstrating her commitment to working with other members of BMO Financial Group and excellent working relationship with her clients.

In her personal time, Lisa enjoys outdoor activities, volunteering at her children's schools and travelling with her family.

Experience & background

Lisa has 18 years of experience in the Estate and Trust Industry. Lisa has successfully completed the Canadian Securities Course, and holds a

Bachelor of Science Degree (Econ) from Dalhousie University. She has also earned a Member Trust Institute Designation and is part of The Estate Planning Council of Vancouver.

Education & credentials

- Bachelor of Science (Econ)
- Member Trust Institute (MTI)
- Canadian Securities Course (CSC)

What sets us apart

Using a holistic approach, Lisa collaborates with her colleagues in BMO Private Banking to design integrated solutions to enable clients to help achieve their personal wealth goals. Lisa's goal is to empower clients with comprehensive and customized solutions, resolving complex situations through coordinated and proactive wealth plans. Lisa knows how to navigate the nuances and complexities of wealth management so that clients can have the confidence that their goals are within reach.

Expertise Commitment Collaboration

BMO Private Banking

We are a dedicated team of highly disciplined Banking, Investment, 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

Lisa J. Finden
Direct: **604 665 3781**
Lisa.Finden@bmo.com

BMO Trust Company
BMO Private Banking
595 Burrard Street, 9th Floor
Vancouver, BC V7X 1L7

bmo.com/privatebanking
We're here to help.

