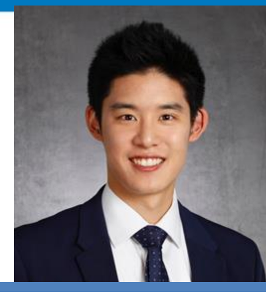
Nicco Bautista, L.L.B., M.A.

Director, Wills & Estate Planning at BMO Wealth Management



"My estate and wealth management plans are custom-made and align family dynamics, tax efficiency, and financial flexibility. They are designed to transfer wealth to the next generation in a way that minimizes tax and litigation exposure."

About Nicco

Nicco works with clients and other members of the BMO Wealth Planning Team to prepare estate plans for clients. These plans often include wills and trusts, after considering business and tax planning, estate and family law litigation exposure, and other complex issues which may be unique to the client, such as charitable giving and planning for family members with special needs.

Nicco has experience working with clients' key advisors and family office members. Together, Nicco can help with the creation or refinement of a comprehensive estate plan that helps families achieve their goals across different generational and cultural philosophies.

Experience & background

Prior to joining BMO Wealth Management, Nicco worked in the private client services and wealth preservation teams of the largest law firm in Vancouver. During this time, Nicco focused on tax and estate planning issues related to individuals, corporations, trusts and estates. Nicco also has experience in estate litigation, estate administration, family law planning, and the creation of private foundations.

Education & credentials

- L.L.B., University of British Columbia
- M.A., University of British Columbia
- B.A. (Hons), University of British Columbia
- Member, Canadian Association of Gift Planners

Languages

- Mandarin
- Taiwanese / Hokkien
- Tagalog

What sets us apart

Using a holistic approach, Nicco 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.

Nicco's goal, as part of the BMO Wealth Planning team, is to empower clients with comprehensive and customized solutions, resolving complex situations through coordinated and proactive wealth plans.

Expertise
Commitment
Collaboration

BMO Wealth Planning

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

Let's connect

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We're here to help.

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