

David Tremblett, CFP, TEP

Vice President, Personal Trust
BMO Wealth Management



“Estate Planning is the cornerstone of any holistic Wealth Management Strategy”

About David

David brings over 20 years of experience in the Trust and Financial Planning Industry as a Trust and Estate Planner. He has worked extensively with our clients in the area of Estate, Will and Trust Planning.

He has earned his Certified Financial Planner and is a member of the Society of Trust and Estate Practitioners.

Serving Your Needs

If you have been appointed as executor or trustee and find the responsibility too onerous or time consuming, we can simplify your life by helping you fulfill your duties, and act as your Agent.

If you are considering a corporate executor, you can choose to appoint BMO Trust Company to help you with estate planning and administration.

Things to Consider

When considering who to appoint as executor, look for the following qualities:

- Knowledge,
- Accessibility,
- Fairness,
- Integrity,
- Emotional stability.

Our Services

David is committed to providing expert Estate Planning advice to ensure our clients have a capable executor to fulfill their duties.

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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BMO  **Wealth Management**

We're here to help.™

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