Enterprise Wealth Planning Group

Noel Perera, CMA, CPA, CA

Director, Tax Planning at BMO Wealth Management

"By actively listening to clients' unique goals and objectives, I work with them to optimize their tax and estate plan and ensure that it is fully integrated into their larger wealth plan."

About Noel

With almost 25 years of experience, Noel understands the broad issues that wealthy families face. By taking the time to understand each client's specific goals and objectives, he brings his extensive subject matter expertise to help guide families through the unique opportunities and challenges that they may be facing in the areas of tax and estate planning, corporate structuring, business succession planning, trust planning and family governance.

Noel can skillfully take complex tax and estate planning issues and considerations, and speak to clients in a way that they can easily understand these issues.

Experience & background

Noel joined BMO Wealth Management in 2017. In addition to his tax/accounting background of almost 18 years at Deloitte & Touche LLP, he has extensive experience in the investment industry as well, including working at a large fund management company. Most recently, Noel worked as a Tax Planning & Consulting Specialist where he focused on tax planning and wealth transfer strategies for high net worth clients and business owners.

Education & credentials

- Chartered Accountant (CA)
- Certified Management Accountant (CMA)
- Chartered Professional Accountant (CPA)
- CICA in-Depth Tax Courses

What sets us apart

Using a holistic approach, Noel collaborates with his colleagues at 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.
Noel's goal, as part of the Enterprise Wealth Planning team, is to empower clients with comprehensive and customized solutions, resolving complex situations through coordinated and proactive wealth plans.

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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