John M. Paniccia, CPA, CA, CBV, FEA

Vice President, National Director of Business Advisory & Succession Planning at BMO Wealth Management

"Our team offers our valued business owners informed insight across **ownership**, **succession**, **transition** *and* **exit strategies**. *Leveraging advanced market and business valuation experience, and a depth of understanding of the financial and emotional complexities of family wealth, we help clients achieve their objectives in the most efficient methods possible maximizing all the potential benefits."*

About John

John is an experienced business advisor and brings a broad base of technical and business planning experience to BMO Wealth Management. John offers individuals and business owners expertise in business succession, transition, sale, M&A, insurance and valuations for the purposes of wealth planning and transfer.

Experience & background

John has over 15 years of experience primarily in the Big 4 professional services firms, as well as experience in a family owned private business. Within professional practice, John has lead a significant number of complex business valuations and business advisory engagements for private and public companies involved in a variety of industries in connection with M&A, corporate reorganizations & income tax planning, shareholder disputes, corporate finance activities, as well as succession, tax & estate planning for private business owners.

Education & credentials

- BBA (Honours), Schulich School of Business, York University
- Chartered Accountant (CPA, CA)
- Chartered Business Valuator (CBV)
- Family Enterprise Advisor (FEA)

What sets us apart

Using a holistic approach, John 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.

John'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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