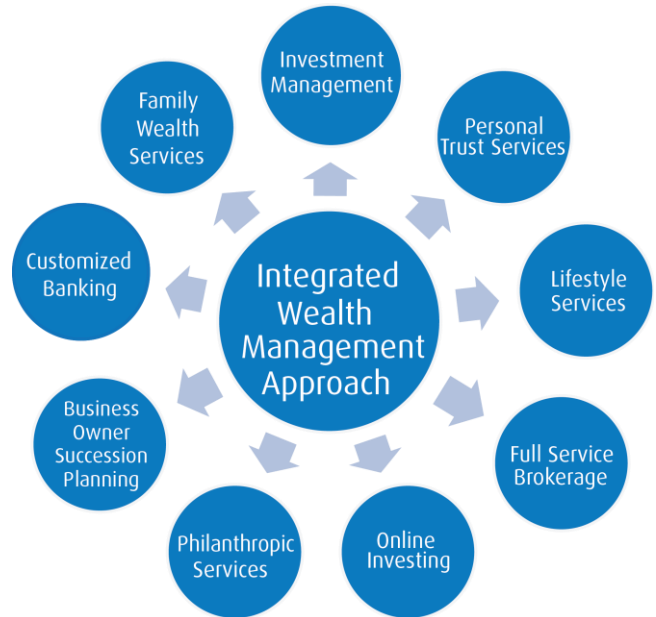


Your Team of Experts

Collaboration is
key to success

Integrating wealth planning services

- Estate and Trust Services
- Tax Planning
- Business Succession Planning
- Insurance Solutions
- Private Banking
- Commercial Banking and Lending
- Philanthropic Giving



Our Comprehensive Approach

Managing your wealth is not simply a financial exercise. It requires an appreciation of your needs and an in-depth understanding of your goals, values and how they affect you. We understand that the most effective wealth management plan starts with a discussion about you. Knowing where you are today, where you want to go and how you are going to get there.

An organized financial planning process is a powerful way to ensure that your wealth management goals are identified and achieved. We believe that an essential role as your Wealth Managers is to act as a **quarterback for your financial future**. Acting as your single point of contact, we will coordinate the team of professionals supporting you, including your current professionals and any additional experts that are needed.

Our team can draw upon the full depth of the BMO Financial Group of Companies to provide you with an integrated and multi-disciplinary wealth management solution. Access to a wide range of services and specialists at no additional cost to you. Our team of experts are highly skilled and dedicated to bringing you a customized strategy tailored specifically to your wealth management needs.