

Timothy J. Simpson

Estate & Insurance Advisor



Experience

Timothy joined BMO Estate Insurance Advisory Services in 2007 and is now 20 years in the financial services industry, having held various wealth and risk management positions. Bringing clarity to complex life events and decisions, Timothy consistently delivers a polished and professional approach to risk and wealth management concepts.

Business Philosophy

By focusing on structures of life insurance and living benefits, Timothy works with clients to give guidance with estate planning and risk management needs. Whether for a charity, business, not-for-profit organization or personal, Timothy is adept in creating custom-designed creative solutions to meet specific needs and wants, and integrates them with wealth management plans.

Legacy is Why

Timothy works with clients by listening to what they want and providing them with strategies for achieving these desires while creating tax efficiency within the client's personal and/or corporate portfolios. Clients and their respective tax and legal advisory teams have come to trust and rely upon Timothy's valuable knowledge and sound advice.

Background

An active sports enthusiast and philanthropist, Timothy is a firm believer in giving back to the community. In particular, he is a dynamic supporter of the Heart and Stroke Foundation, the Kiwanis Club of Toronto (Treasurer elect), the Toronto Kiwanis Foundation (Board Member) and actively participates with and is on the Board of the Toronto Youth Development Organization.

Our offering

BMO Estate Insurance Advisory Services delivers innovative and customized insurance solutions to clients through our Estate & Insurance Advisors (Financial Security Advisors in Quebec). We assess your wealth management needs and recommend insurance strategies that are designed to preserve, enhance, transfer and protect the wealth you've created. Whether you're focused on growing your investments in a tax-efficient way, leaving a legacy to your heirs, or have concerns about adequate insurance coverage, we will collaborate with your Investment Advisor to help with your estate and insurance needs.

Let's connect

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