Anderson Wealth Advisory Group BMO Nesbitt Burns

Background

We have been providing peace of mind for clients regarding financial and family issues since 1999. We have clients in the local area as well as Victoria, Vancouver, the Okanagan and Ontario. Keith is a CPA,CA a Fellow of the Canadian Securities Institute and a Certified Professional Consultant on Aging. Greer has a B Comm from the University of Victoria and a MBA from Simon Fraser University.

Business Philosophy

Clients tell us that trust is the most important point regarding their investments and retirement. We listen to our clients and get their "whole story". Only after we fully understand them and their particular family circumstances can we develop a plan and portfolio that suits their needs. Cash flow portfolios for clients that need income, an equity portfolio for someone who is building assets, or a conservative protection portfolio for someone who wants to preserve their wealth. Time we spend with our clients gives them peace of mind.

The Importance of a Sound Investing Partnership

Clients' peace of mind comes as a result of always doing what you say you're going to do, from the trust you build in relationships. Many of our clients have been with us for 15 years or more. The partnerships we've developed with clients have allowed us to weather many storms, both market and family related. We've provided for an orderly transfer of assets through an effective estate plan, provided for liquidity to survivors through an insurance plan, funded that unexpected expense with an emergency fund and helped save for that special goal.

Service Excellence

Keeping clients informed is a top priority for us, and this means providing access to a wealth of educational materials, promptly returning phone calls, and quickly following up on administrative issues. It also involves monitoring accounts on an ongoing basis to take advantage of opportunities and changing market conditions as they arise. We regularly review goals, strategy, costs and portfolio performance with our clients.

About BMO Nesbitt Burns

BMO Nesbitt Burns is one of North America's leading full-service investment firms. It has been committed to helping clients meet their investment objectives and goals since 1912. Today, BMO Nesbitt Burns is focused on meeting the needs of individual investors through a customized approach to wealth management. Backed by our industry leading research, we believe in maintaining strong relationships with our clients and providing industry leading solutions. As part of BMO Financial Group, BMO Nesbitt Burns also provides clients with access to one of the broadest selections of wealth management solutions and services available today.

To Learn more visit bmo.com/nesbittburns

Let's connect

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