

Elizabeth Bozek, B.Sc (Hons), LL.B.

Director, Estate Planning at BMO Wealth Management



picture here

“Estate planning is more than just having a will in place. I help advisors and clients find solutions that minimize the risk of future conflict, while setting out a roadmap to secure the clients’ legacy.”

About Elizabeth

Elizabeth works with other members of the High Net Worth and Specialized Wealth Planning team to develop personalized estate planning solutions for high net worth and ultra-high net worth clients. Elizabeth is sympathetic to the needs of her clients and mindful of the importance of family dynamics in the estate planning conversation. She is adept at communicating the importance of a total estate plan to clients and advisors alike.

Experience & background

Elizabeth has a wealth of experience in the world of estates and trusts. She joined BMO after 7 years in private practice, where her practice encompassed estate litigation, planning and administration, alternative dispute resolution, and incapacity planning. She most recently spent 3 years at a national trust company, where she honed her expertise in estate planning for high net worth clients. She is actively involved in the estates bar, and continues to organize and chair programs of interest for estate and trusts lawyers across the province.

Education & credentials

- LL.B., Osgoode Hall Law School
- B.Sc. (Hons), University of Toronto
- Member of the Law Society of Ontario

What sets us apart

Using a holistic approach, Elizabeth collaborates with her 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.

Elizabeth’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

Elizabeth Bozek
Direct: **416-359-6947**
Mobile: **416-476-8255**
elizabeth.bozek@bmo.com

First Canadian Place, 100 King St. W.
39th Floor, Toronto ON M5X1A1

[bmo.com/wealth](https://www.bmo.com/wealth)
We’re here to help.



We’re here to help.™