

Fanny Grenier, CPA, CA

Director, Tax & Wealth Planning at BMO Wealth Management



"We help affluent families determine what is important to them, present solutions which will assist them in realizing their goals, and work with their advisors to help ensure their plans are put in motion."

About Fanny

Fanny leads a collaborative team of professionals and works closely with advisors from across BMO to support affluent families, their trusted advisors and family offices to help grow, manage and transfer their assets. Her breadth and depth of knowledge in the areas of tax, estate and succession planning enables her to create tailor-made solutions to meet the unique, and often complex, needs of Ultra High Net Worth individuals.

Experience & background

Fanny received a Diploma in Public Accountancy in 2003 from Université du Québec en Outaouais and has worked as a CPA, CA since 2005. Fanny also completed her Master degree courses in Taxation from University of Sherbrooke and is currently writing a thesis on Advanced Tax and Estate Planning. Prior to joining BMO, Fanny spent over a decade at major accounting firms working with affluent families and their businesses, advising on sophisticated tax and estate planning strategies. In 2014, Fanny joined the wealth advisory industry where she expanded her skillset and knowledge to provide advice on philanthropy, lending, insurance, investments, business succession and

family & corporate governance. This experience offers a differentiated client approach in strategically delivering custom solutions that meet the demands of this important segment.

Education & credentials

- CPA, CA
- Diploma in Taxation
- Diploma in Public Accountancy
- Bachelor in Finance

What sets us apart

Using a holistic approach, Fanny collaborates with her colleagues in BMO Wealth Planning to design integrated solutions to enable clients to help achieve their personal wealth goals. Fanny's goal is to empower clients with comprehensive and customized solutions for complex situations through coordinated and proactive wealth plans. Fanny knows how to navigate the nuances and complexities of wealth management so that clients can have the confidence that their goals are within reach.

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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