

Dante Rossi, CPA, CA

Director, Tax Planning at BMO Wealth Management



“As a subject matter expert, my technical knowledge is a key differentiator for our Wealth Consultants and Advisors, helping to distinguish our innovative wealth management offering, and create value-add for clients.”

About Dante

Dante advises high net worth business owners and families on specialized Tax & Estate solutions aimed at maximizing their wealth, as part of an integrated wealth planning team. Drawing on a decade of tax accounting experience, his clients benefit from a depth of informed insight and the ability to distill complex concepts into actionable strategies. Specializing in Canadian corporations and entrepreneurs, Dante offers guidance on tax structuring, estate planning, exit strategies and tax-efficient wealth transfer, creating tailored solutions for a diverse group of clients.

Experience & background

Dante joined BMO Wealth Management in 2015 from global professional services firm Deloitte LLP, where he worked for 10 years in progressively senior roles, managing and executing detailed reviews of complex corporate, personal, partnership and trust tax compliance and planning engagements.

Education & credentials

- Chartered Professional Accountant (CPA, CA)
- CERTIFIED FINANCIAL PLANNER® Candidate (2017)
- CPA Canada In-Depth Tax Course I, II & III
- Member of the Canadian Tax Foundation

What sets us apart

Using a holistic approach, Dante collaborates with his colleagues across 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.

Dante's goal, as part of the Enterprise 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

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We're here to help.