

Marta Lapeña

Senior Private Banker at BMO Private Banking



With over 25 years of experience working in banking and finance, Marta specializes in providing guidance for successful Canadian families. She supports a comprehensive and holistic approach to wealth management and her goal is to help her clients and their families plan, grow and protect their wealth now and in the future.

About Marta

Marta provides an exceptional client experience. Using her extensive background in various banking roles, she has the ability to provide expert guidance. Marta manages and continually enhances the client understanding through strong relationship management.

She is the proud mother of fraternal twins. They are fully bilingual in English and French. Her son is working on a translation degree at York University, and has a band that spends all their time practicing at home with Marta's full support even with loud drums! Her daughter has been studying at McGill University in Montreal and in Europe, working on her future career in the communications field. With her husband who is a design builder, they are often found working on home improvement projects.

Experience & background

Marta has 25 years' experience with Bank of Montreal, managing relationships with retail, commercial, and private clients in Canada, with additional cross border banking arrangements in the United States. Through Marta, clients can access an array of customized, integrated banking solutions for individuals, executives, personal holding companies, and professional

corporations addressing various levels of complexity.

Education & credentials

Marta is a qualified lender, Professional Financial Planner, and earned her B.A. in psychology from York University. She is fluent in English, Spanish and French.

What sets us apart

The successful management of wealth requires a coordinated approach by a team of professionals. Through Marta at BMO Private Banking in partnership with investment advisors at Nesbitt Burns, we offer differentiated value to clients. We are different because:

1. Our business focuses exclusively on a unique client segment — high net worth Canadian families.
2. Our culture attracts the best people.
3. How we work together sets us apart.

These three areas of differentiation truly set us apart. Let's talk about what matters to you.

My goal is to empower you with comprehensive and customized solutions through a coordinated wealth plan, and to help client navigate the nuances and complexities of wealth management with my team to help you reach your goals.

Expertise Commitment Collaboration

BMO Private Banking

We are a dedicated team of highly disciplined Banking, Investment, Estate & Trust, Financial Planning, Business Advisory and Philanthropic specialists. Planning focused, our solutions are informed by insight, expertise 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.

