Philip Burton Wealth Management Group

An Unwavering Commitment to Quality.

With decades of experience behind us, our team's focus is on providing comprehensive, holistic, and customized solutions to our clients, through a disciplined process that enables you to meet your goals.

Let's connect

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Wealth Advisor

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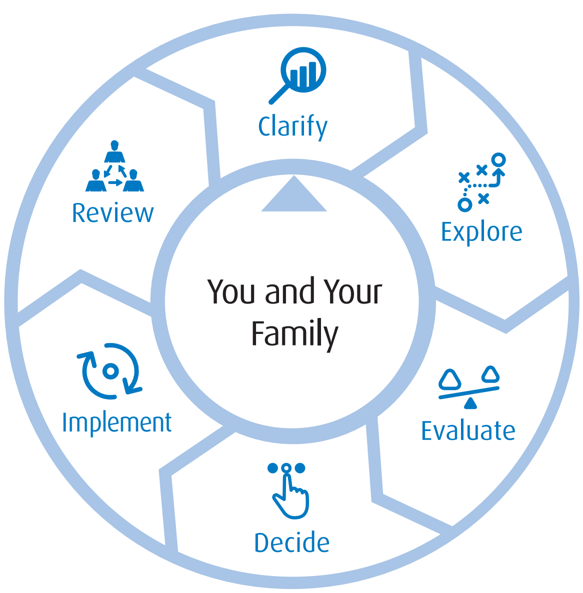
Investing Philosophy

Our portfolios are designed for conservative investors seeking a mix of income, growth, and tax efficiency.

- Each portfolio is individually tailored.
- Portfolios are professionally monitored, updated, and rebalanced regularly.
- Our fee model is competitive and fully transparent.



Wealth Planning Process

A professionally prepared Wealth Plan is important to help you coordinate and sync how the various elements within your financial picture work together. To this end, our team's comprehensive wealth planning covers:

- Risk Management (Insurance)
- Retirement Planning
- Tax strategizing & optimization
- Trust, Estate, & Succession Planning

Relationship Focus

Our team is committed to providing exceptional client service, a high level of value, and building life-lasting client relationships.

About BMO Private Wealth

BMO Private Wealth 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 Private Wealth 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 Private Wealth also provides clients with access to one of the broadest selections of wealth management solutions and services available today, including estate planning and insurance.

BMO Private Wealth

Philip Burton
WEALTH MANAGEMENT GROUP
BMO Nesbitt Burns

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