Grant Brooks, CFP, CLU

Director, Wealth Planning at BMO Wealth Management

"I take time to listen to and explore the goals and concerns of high net worth families and business owners to provide clear strategies and solutions to retirement planning, tax minimization, estate and trust succession, and stewardship of their family legacy."

About Grant

Grant is passionate about helping high net worth families and business owners to develop a clearly defined comprehensive wealth plan and strategies that serve to assure their retirement needs, minimize tax through optimal cash flows, integrate business planning, and implement appropriate trust and estate planning to fulfill family legacy and philanthropic goals in tax efficient manners. Drawing on a depth of planning acumen and our team of in-house technical specialists, Grant strives to translate complex strategies into understandable solutions that address clients' planning issues, goals, and concerns, to provide them with a sense of financial well-being and an affirmation of their family's wealth stewardship.

Experience & background

Grant joined BMO Wealth management in 2015. He has over 12 years of experience as a financial planning practitioner and financial advisor. He has a strong depth of understanding and experience in tax, business, retirement, estate, and insurance planning. Grant has a breadth of experience working with business owners, executives, and professionals including transition planning, generational wealth transfer, and complex family situations. More importantly, Grant understands the emotional side of clients and knows how to listen to them to personalize solutions and tailor delivery of planning recommendations to be meaningful.

Education & credentials

- Certified Financial Planner (CFP)
- Chartered Life Underwriter (CLU)
- Canadian Securities Course (CSC)
- Life License Qualification Program (LLQP)

What sets us apart

Using a holistic approach, Grant collaborates with his 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.

Grant'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

Enterprise Wealth Planning

We are a dedicated team of highly disciplined Tax, 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

Grant Brooks
Direct: **403-296-1290**
Grant.brooks@bmonb.com
www.linkedin.com/in/grant-brooks-cfp

100, 4954 Richard Road SW
Calgary, AB
T3E 6L1

BMO Wealth Management
We're here to help.™

bmo.com/wealth
We're here to help.