Lisa Kayaga, LL.B, LL.M, TEP

Director, Estate Planning at BMO Wealth Management

I strive to provide an exceptional client experience by taking the time to understand the specific complexities of our clients and empowering them to make informed decisions that are in their best interests.

About LISA

Lisa is part of the High Net Worth specialists team and she advises high net worth clients on their complex estate planning to help them understand the different strategies that they can use to preserve family relations and maximize their wealth.

Having practiced law in Ontario and Alberta, clients benefit from her extensive experience with will, estates, trust and incapacity issues. Using her strong interpersonal skills, she is able to simplify complex estate matters for clients so that they have the confidence to instruct their trusted professionals to set up their estate plans.

Experience & background

Prior to joining BMO Wealth Management, Lisa was with a national trust company where she dealt with High Net Worth clients and advised them on their complex estate planning.

Earlier in her career she practiced law in Ottawa, Ontario. Her practice was focused on private client services including estate planning, wills, trusts and estate administration ranging from routine matters to complex multi-jurisdictional estates.

Education & credentials

- TEP- Society of Estate and Trust Practioners (STEP)
- Canadian Securities Course
- LL.M , Queen's University , Canada
- LL.B, Makerere University, Uganda
- Call to Alberta Bar, 2014
- Call to Ontario Bar, 2012
- Executive member- STEP, Calgary Branch
- Executive member, Estate Planning Council, Calgary Branch

What sets us apart

Using a holistic approach, Lisa collaborates with her 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.

Lisa's goal, as part of the BMO 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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BMO Wealth Management

We're here to help.™

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