

BMO Trust Company

Shawna Albornoz, TEP, MTI, EPC

Vice President, BMO Trust Company



"I provide expert estate and trust planning advice and the services of BMO Trust Company to ensure our clients and their families have a capable Executor and Trustee that can fulfill their duties to protect the estate and maintain harmony in the family."

About Shawna

Shawna brings over 17 years of experience in the Trust and Estate industry and has administered over 130 estates and trusts. She provides expert advice and direction to ensure our clients' estates are administered properly and without conflict for their families and loved ones.

Shawna has her MTI (Member, Trust Institute) and TEP (Trust and Estate Practitioner (STEP) designations and is a member of the Calgary Estate Planning Council.

If you have been appointed as an executor or trustee and are concerned about the time commitment, scope of responsibility, or personal liability, BMO Trust Company can act as your agent to complete the administration and provide professional advice and direction.

If you are considering a corporate executor we will work with you to create an estate plan that names BMO Trust Company as your executor and distributes your assets according to your wishes.

What sets us apart

Shawna works with clients to understand their wishes, their family dynamics, and their concerns in order to create solutions that will fulfill her clients wishes and maintain harmony with their loved ones. She advises on all aspects of fiduciary responsibilities to ensure her clients understand and plan for their estates or incapacity accordingly.

Shawna's goal is to provide comprehensive and customized solutions to resolve complex situations. Through her collaboration with BMO Enterprise Wealth management Shawna is able to bring in subject matter specialists (tax, financial planning, business succession, insurance) when needed to address all aspects of her clients 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

Shawna Albornoz
Direct: **403-503-7384**
Shawna.Albornoz@BMO.com

4954 Richard Road SW.
Calgary, AB T3E 6L1

BMO  **Wealth Management**
BMO Private Banking

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We're here to help.

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