

Trusted Advice for Life

The Kaszas Group provides a higher level of wealth management. Our clients receive timely advice, quality service and customized investment strategies to discover the true potential of their wealth. We provide trusted advice for life and our experience is the cornerstone of our success.



The Kaszas Group – one team offering a world of wealth advisory services.

Contact us today:

The Kaszas Group

BMO Nesbitt Burns
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Toronto, ON

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THE
Kaszas
GROUP

Our business philosophy

Our business philosophy, as well as our approach to assisting our clients, begins with a thorough understanding and assessment of their wants, needs and life goals. We work closely with our clients for the long term. This enables us to address the evolving need for capital growth and preservation, tax minimization and above all else – clarity. We work hard to offer our clients an extensive range of financial products and services to further benefit their financial situation. With our depth of experience, we are able to create and maintain wealth management solutions for today and tomorrow.

Bringing together the best of the best

BMO Nesbitt Burns is one of North America's most respected and reputable financial service providers. We draw upon the full depth and breadth of BMO Financial Group to provide our clients with integrated and multidisciplinary wealth management solutions. This includes, but is not limited to:

- Investment Solutions
- Financial Planning
- Retirement Planning
- Estate and Insurance Services
- Trusts and Wills
- Group Pensions and Benefits
- Charitable Giving Programs
- Personal and Commercial Banking

The Kaszas Group is closely connected to the internal expertise in all financial areas. Depending on the complexity or simplicity of our client's financial situations, we will leverage the knowledge of our internal partners, including:

BMO Capital Markets Research and Economics: This group has been named the best overall institutional equity research, sales and trading team in Canada*. In equity research, BMO ranked 1st for research quality and placed second for overall research franchise*. With these strategic partners, we continue to build stronger client portfolios.

Portfolio, Action and Research Team: With specialized knowledge in Canadian and US equities, investment funds, fixed income and technical analysis, this group provides invaluable research to our strategic portfolio recommendations.

Wealth Management Group: These experts provide an integrated and multidisciplinary wealth management process that covers all aspects of managing, protecting and transferring wealth for our clients.

BMO Bank of Montreal: Our team includes contacts at BMO Bank of Montreal. BMO provides comprehensive lending advice and tax-effective lending strategies with respect to mortgages, RRSP loans, TFSA loans and investment leveraged loans.

We believe in collaborative teamwork and our clients appreciate having their financial affairs wholly managed according to plan, with the utmost professional care.