Considering Business and Family

Is your personal wealth strategy as refined as your business strategy?

Managing your business and family wealth strategies can present a number of financial, personal, business and emotional challenges, especially in times of change or uncertainty.

For business owners, examining the inter-related wealth planning opportunities across both your business and family can be challenging. That's why it's important to apply a consistent and coordinated approach to managing your business and family interests, to help you achieve your overall wealth management goals and objectives.

BMO's Business Advisory and Transition Planning professionals collaborate with you, other BMO financial professionals, and your other advisors (internal and external) to help build customized financial solutions that help you achieve both your business and personal goals. The team is a group of highly skilled professionals located across Canada who have deep and practical senior level experience in working with business owners and their families to manage the complexities these situations present. They possess a comprehensive understanding of the financial and personal issues and opportunities faced by owners of private businesses and their families in the field of Business Transition.

How we can help:

- Family wealth purpose and blueprint
- Business and family estate and succession planning strategies, including:
  - Planning before business ownership transfer, sale or transition
  - Management succession planning
  - Education on the sale process
  - Pre-sale strategies and structuring
  - Transaction planning and support
  - Buy-sell agreements
  - Valuation considerations and insights
- General business advisory, exit strategies and risk management
- Preservation and growth of family wealth
- Family dynamics and communication strategies
- Family and business governance matters
- Corporate finance activities and financing alternatives

BMO Wealth Planning collaboration

To assist you with your integrated business and family wealth management plan, the Business Advisory and Transition Planning team collaborates with other BMO specialized planners, including: Tax, Estate, Trust, Financial Planning, Insurance, and Philanthropic professionals to create a multi-disciplinary team. Planning focused, our solutions are informed by insight, experience and a commitment to help clients realize their objectives across all stages of your business and personal life.

The BMO Business Advisory and Transition Planning team provides:

- **Experience** — Specialized team with vast experience, insights and perspectives to help business owners with business and family wealth planning.
- **Options** — Sophisticated wealth transfer, estate and business succession planning strategies.
- **Value** — Identification of strategic opportunities and potential risk exposure.
- **Partnership** — Collaboration with your other trusted advisors to develop integrated business and family planning strategies.

Please speak with your BMO financial professional to connect with a local Business Advisory and Transition team professional.

BMO Financial Group

05/20-1202 ID3769