

# Wealth Creates New Opportunities...

and opens doors to new possibilities – ones that can enhance your financial health and give you more time to focus on what matters. Personalized Wealth Planning provides perspective and objective analysis to help you navigate these opportunities and make informed decisions aligned with your full financial picture and life goals.



## Experience Your Custom Wealth Plan

Your financial situation is unique, and so are your goals. Our experts create a tailored Wealth Plan that fits seamlessly with your life and aspirations. Experience the difference a personalized plan can make in achieving your complete financial success.



Private Wealth

## Let's build a plan together.

We're here to back you at every stage. Priorities, challenges and opportunities, they're all part of the plan.



### Investment Management & Wealth Planning

Experience a strategic alliance between you and your wealth team when it comes to asset allocation, portfolio construction and continual monitoring.



### Insurance & Risk Management

Secure your lifestyle and protect what matters. When your accomplishments and wealth expose you to heightened risks, standard policies may fall short. Our tailored approach includes a personal risk assessment to safeguard your assets, and mitigate erosion of value for you, your family, and your business.



### Tax Planning Strategies

Embrace tax strategies to make taxes a smaller part of your finances. Preserve wealth and achieve goals tailored to your unique circumstances, whether for today or the future.



### Business Succession & Family Governance

Navigating the delicate balance between business growth and preserving your family's legacy requires the right strategies. Transitioning or exiting your business can be a tough and emotional decision. We can collaborate with you and your other Advisors to create a way forward.



### Retirement Planning

You likely have a vision for your retirement. We'll help you plan and guide you toward achieving your ideal retirement.



### Trust & Estate

We work with you to put an estate plan in place that reflects your wishes, safeguards your wealth, streamlines administrative tasks, and ensures a seamless transfer of assets according to your wishes. Our approach minimizes emotional and administrative burdens for you and your family, providing you with peace of mind and allowing you to focus on what matters most.



### Philanthropic Planning

Turn your charitable vision into reality. Share your passion with us, and we'll help bring it to life.

Let's get started.  
We're ready.

Speak to a BMO Private Wealth professional to learn more about how we can support you and your family's wealth planning.



Learn more at [bmo.com/privatewealth](https://bmo.com/privatewealth)



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