

Wealth Themes

BMO Private Wealth | October 2022

Wealth Themes provides timely articles on a variety of wealth planning topics. This month we feature articles that focus on business owners, covering a variety of topics, from acquisition financing to succession planning, and how BMO can help when it comes to understanding your needs as a business owner.

Understanding Your Needs as a Business Owner, discusses the changing priorities of a business owner as they transition through various stages of the business life cycle.

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Acquisition Financing, provides considerations when acquiring financing to purchase or buy-out a business using a case study analysis.

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Ensure Your Business is Always Exit Ready, explains exit planning and three important elements to take into consideration for a well thought out exit plan.

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Succession Planning is Key For Business Owners, highlights the importance of succession planning, and considerations for establishing an effective succession plan.

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Donation of Private Company Shares, discusses donating private company shares as a way to support Canada's charitable sector.

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Please don't hesitate to contact the office if you have any questions about these articles.

