

Wealth Themes

Focus on Cross-Border and Abroad

June 2021

Wealth Themes provides timely articles on a variety of wealth planning topics. This month we feature articles that focus on holding assets in multiple jurisdictions, and how they impact your wealth and estate planning considerations.

Estate Planning For Your Worldwide Assets provides strategies and legal considerations to ensure the ease of administration of worldwide assets on your death.

[View the full article.](#)

Incapacity Planning in a Mobile World outlines considerations to ensure your assets, as well as personal and health care decision making, can be properly managed if you become incapable of making decisions while outside your home province or territory.

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Cross-Border Implications of Purchasing Life Insurance Policies explains estate tax complexities that arise for a family member who is a U.S. person (U.S. citizen, U.S. Greencard holder or a U.S. resident).

[View the full article.](#)

Summer Reading List provides recommendations from across BMO Private Wealth, helping you to find the perfect read for this summer.

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

