Our Approach: The Relationship Makes All the Difference

We've made a commitment to our clients

When you work with our Investment Advisors we aim to:







Contact you regularly



Provide quality over quantity



Price with integrity



Create a financial plan

Advised households save at

We know that your goals for the future go beyond investments. The broader picture is often very complex, and many aspects of managing your wealth require special attention. By looking at the bigger picture the major components of your financial well-being will not be overlooked. We aim to give you financial peace of mind.

Our approach with clients is consultative in nature and begins with listening to and understanding your needs. Before we can make any recommendations or suggestions, we need to learn about your vision, your objectives and your level of commitment, so we can help you achieve the financial component of your goals.

STAT

An advised household that has worked with an Advisor for 15+ years has





the entire plan, and evaluate progress to balance your evolving financial needs.

FACT

Advised households are more likely to have a financial plan and are better prepared for the financial implications of life's events.4



ENGAGE

It all starts with a conversation. You and your Investment Advisor will discuss your personal and financial situation, including your life stage, your priorities and your goals.



A strong savings discipline acquired through advice has a positive effect on wealth accumulation.1



TWICE IHE NAID of passive, non-Advised households.

DISCOVER

Together, we will discuss what you need to take care of today and what your aspirations are for tomorrow. We will add vision and structure to your goals.

FACT

Having an Advisor increases confidence in achieving a comfortable retirement.1



IMPLEMENT

Together we will create a strategy that best meets your needs which will help you to achieve the goals you aim to reach

FACT

The Global Banking and Finance Review announced BMO Nesbitt Burns as the Best Full Service Investment Advisory in Canada.3



The Value of Advice



EVALUATE

We will present concepts to assist you in understanding how - together - we can bridge the gap between where you are now and where you would like to be.

FACT





CHEMISTRY IS KEY. You need to be comfortable with your advisor in order to build a lasting relationship.

DECIDE

We will develop short and long-term strategies to help put you on track to achieving your goals. Then, we will ask you to commit to the strategies you feel will best meet their needs.

FACT

Even if you're already working with a finance specialist, the right Advisor can connect everything together so you can save time, money and feel more secure about your complete financial picture.



We will use the extensive resources and support available across BMO Financial Group to help you with all of your life's goals.

- Wealth Planning
- Estate & Insurance • Business Succession • Banking & Borrowing

FACT

We have access to a full spectrum of **RESOURCES & EXPERTS**

to address your needs.

are concerned that, should they pass away, the financial well-being of their family of Canadians would be put in jeopardy.²





Wealth Management **BMO Nesbitt Burns**

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