

9. Execution of wealth management plan

After revisiting your personalized discovery matrix from step 1, consider the following questions:

- What is the purpose of my wealth?
- What are the needs of my family?
- What is my opportunity to establish a legacy?
- How should I invest for retirement?

Now is the time to meet with a BMO financial advisor and develop an investment policy that will guide you and your advisors to produce an investment strategy that caters to your needs, wants, and values.

Contact us

BMO's succession specialists can help you to make the succession planning process straightforward and successful.

For more information, please call 1-866-886-0027.



This information is prepared as a general source of information and should not be relied upon as personal investment, legal, or tax planning advice. We have used our best efforts to ensure that the material contained in the workbook is accurate at the time of publication. Banking Services are offered through BMO Bank of Montreal. Investment Management Services are offered through BMO Harris Investment Management Inc., an indirect subsidiary of Bank of Montreal. Estate, trust, custodial and tax services are offered through BMO Trust Company, a wholly owned subsidiary of Bank of Montreal.

Roy Williams and Vic Preisser, 2003. *Preparing Heirs: Five Steps to a Successful Transition of Family Wealth and Values*. San Francisco. Robert D. Reed Publishers

® "BMO (M-bar roundel symbol) Harris Private Banking" is a registered trademark of Bank of Montreal.

08-107