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.

BMO Financial Group

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

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