Simon Couvrette, CPA, CA, CFP

Director, Wealth Planning at BMO Wealth Management

"Acting as a value-add resource for Investment Advisors and their clients, I provide optimized wealth plans that incorporate Tax, Estate & Trust, Succession, Philanthropic and Retirement guidance – helping affluent individuals simplify the complexities of wealth through smartly structured planning."

About Simon

Simon advises high net worth families and business owners on sophisticated, innovative wealth planning solutions, as part of an integrated team of Wealth Consultants, and in-house tax and estate specialists. Drawing on his extensive tax consulting expertise, strong analytical acumen and bilingual communication skills, Simon helps clients articulate their unique wealth objectives, and realize their goals, ultimately providing support and direction to Investment Advisors – and enhancing the client experience.

Experience & background

Simon joined BMO Wealth Management in 2015, after working as a Manager in Taxation Services for international accounting firm Deloitte, where he advised private clients on tax compliance, estate planning, corporate reorganizations and overall tax minimization. He has six years of professional experience in public practice auditing and taxation services.

Education & credentials

- Honours Bachelor of Commerce with specialization in Accounting, University of Ottawa
- Chartered Professional Accountant (CPA, CA)
- CPA Canada In-Depth Tax Course I, II & III
- CERTIFIED FINANCIAL PLANNER® professional

What sets us apart

Using a holistic approach, Simon collaborates with, and provides support to his colleagues across BMO Wealth Management to help clients clearly articulate their personal wealth goals. Together, we provide a multi-dimensional perspective that offers a valuable complement to our clients' other professional counsel.

Simon's goal, as part of the Enterprise Wealth Planning team, is to empower clients with comprehensive and customized solutions, resolving complex situations through coordinated and proactive wealth plans.

Expertise

Commitment

Collaboration

Enterprise Wealth Planning

We are a dedicated team of highly disciplined Tax, Estate & Trust, Financial Planning, Business Advisory and Philanthropic professionals. Planning focused, our solutions are informed by insight, experience and a commitment to help clients realize their aspirations, at all stages of life.

Let's connect

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