

**BMO**  | **Wealth Playbook**

**The Lion's Den**

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# Meet the Team



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**Target Overview**

The Solution

How it Works

Execution Plan

Competitive Positioning

Investment & Return  
Outlook

Financial Impact

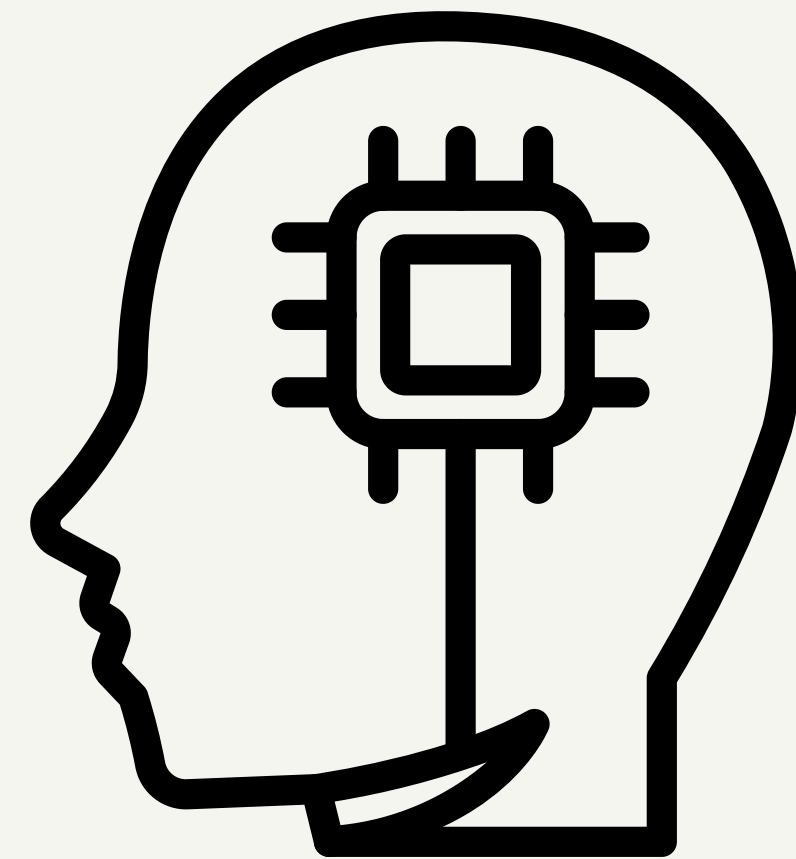
Market & Client Growth

Future Outlook

Q&A

# Target Overview

- **Mid-senior level professionals**
- **150k plus salary**
- **Complex compensation**





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# The Solution:

# BMO Wealth Playbook

- Interactive
- Gamified Interface
- Scenario Testing
- Human + Digital Hybrid
- AI-Powered Personalization



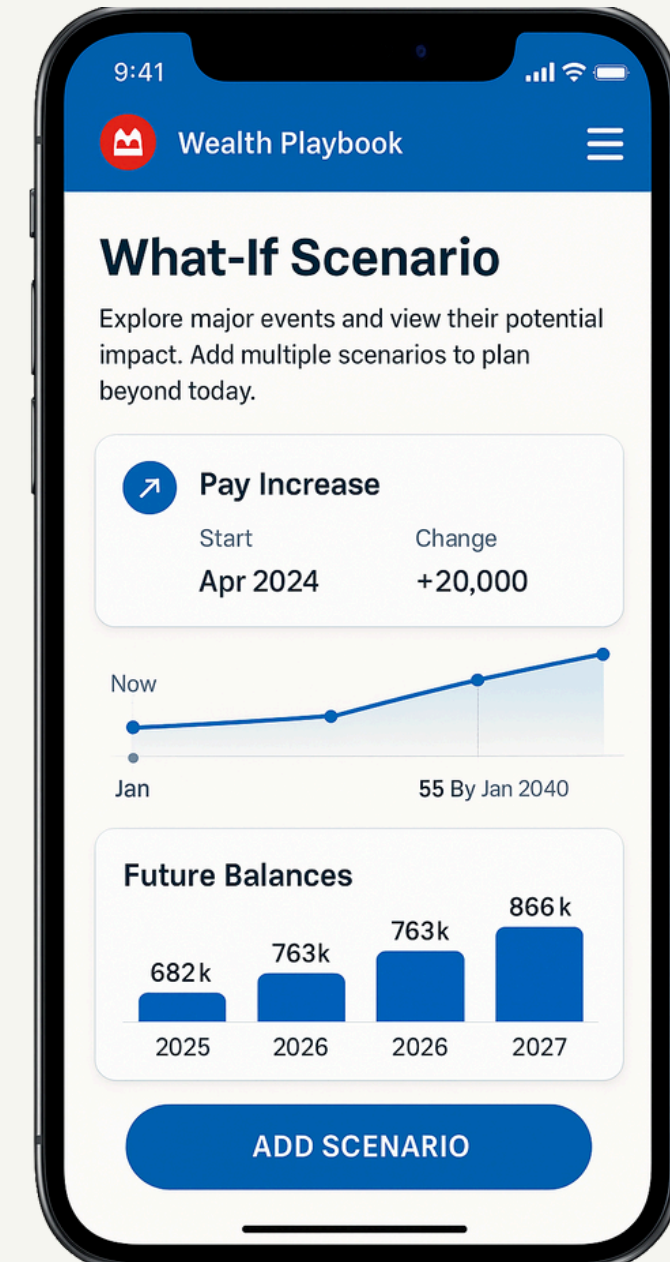
# How it Works



Onboarding & Profile Setup



Strategist Collaboration



Scenario Simulation



Ongoing Insights & Rewards

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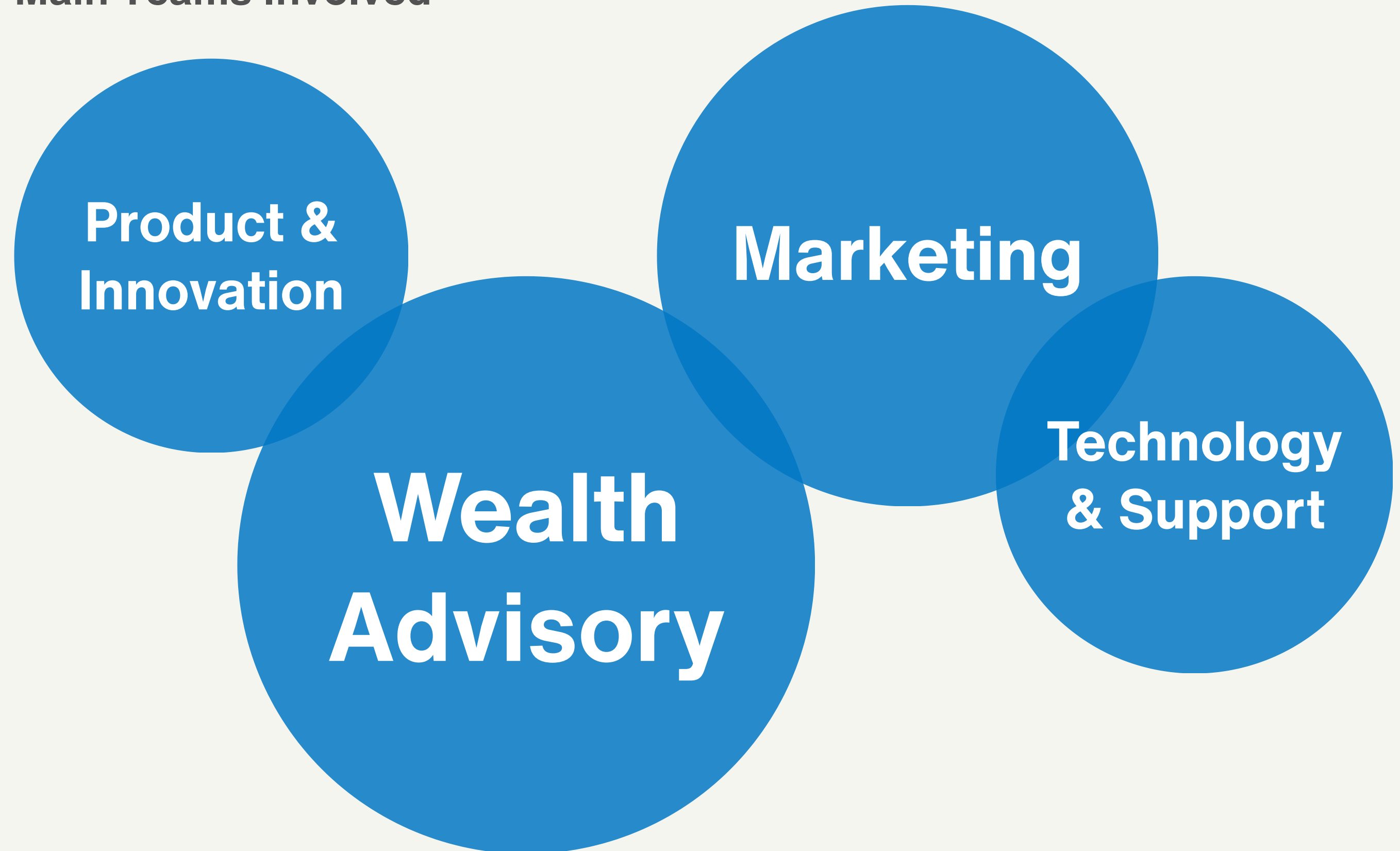
Q&A

# Execution Plan



# Execution Plan

## Main Teams Involved





# Competitive Positioning

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## Competitors

- Other banks
- Fintech, investment apps

## Examples

- RBC MyAdvisor
- TD Wealth Planning
- Scotiabank iTrade
- Questrade
- Wealthsimple

## BMO's Strength

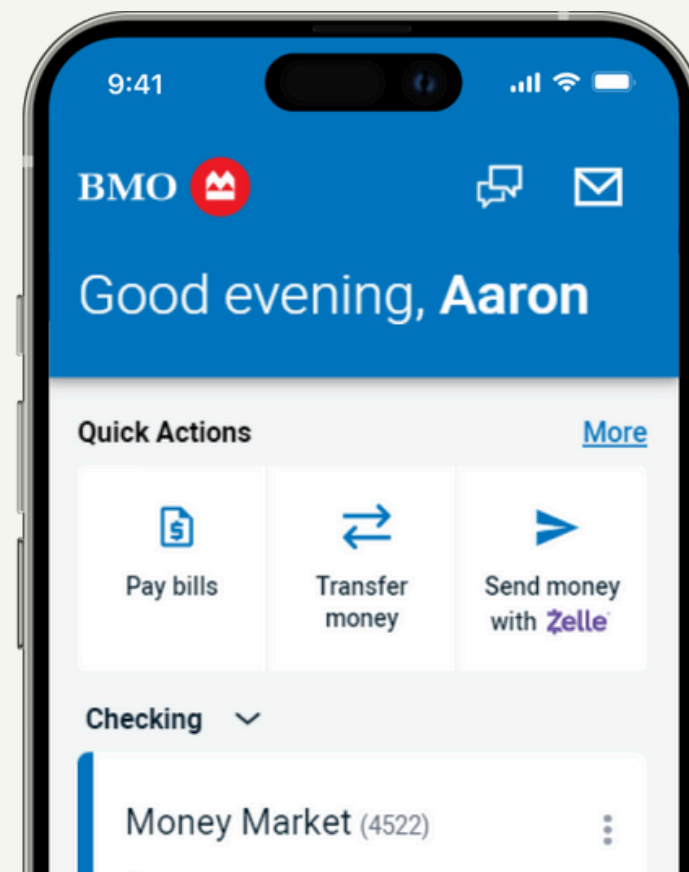
**Credibility**

**Hybrid Experience**





**Integrated Experience**

**Visuals & Simulations**

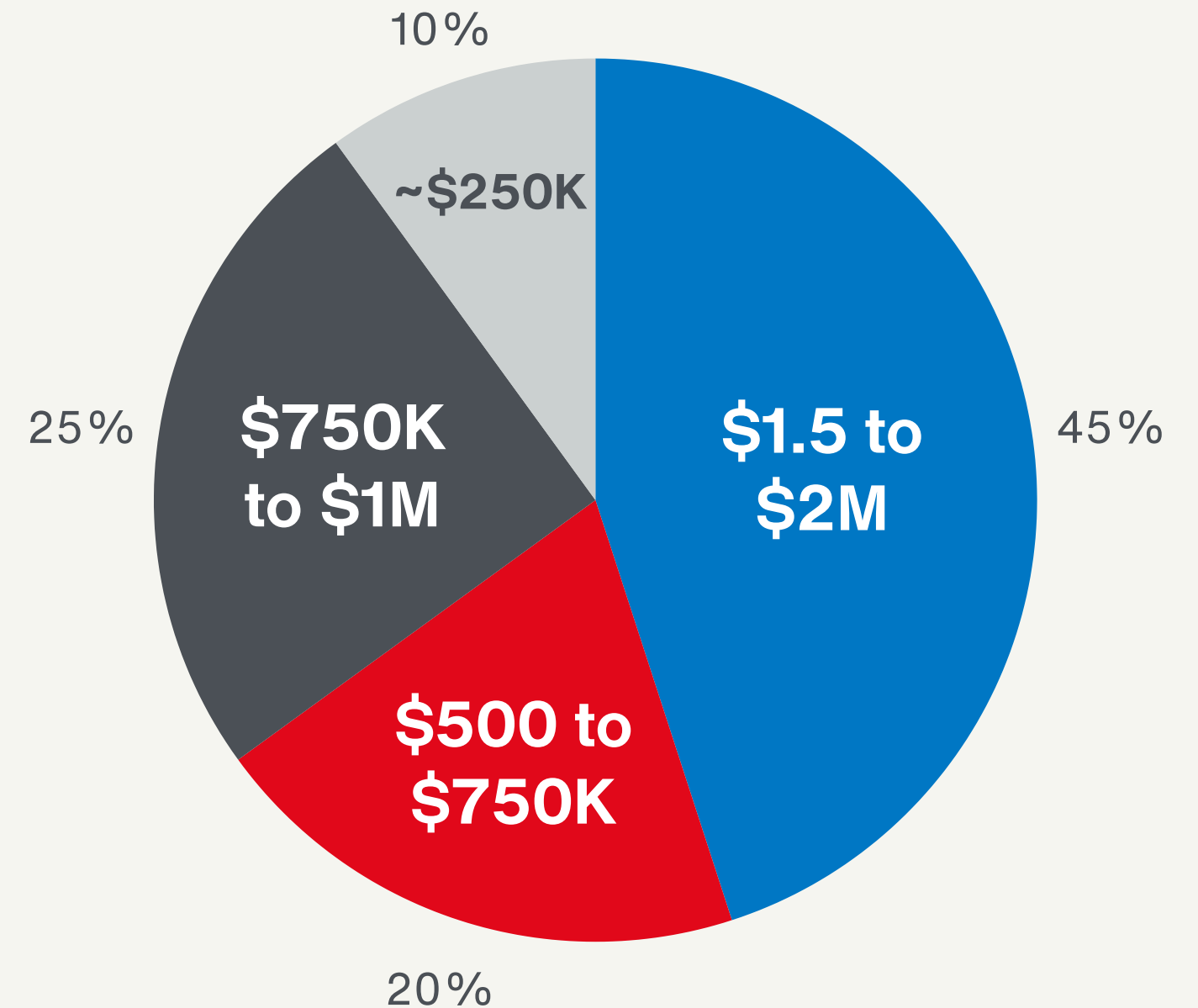
**Targeted Platform**



# Investment & Return Outlook

-  Training & Compliance
-  Development & Data Integration
-  Support & Maintenance
-  Marketing & Client Acquisition

Initial Investment:  
\$2-4 Million



# Financial Impact

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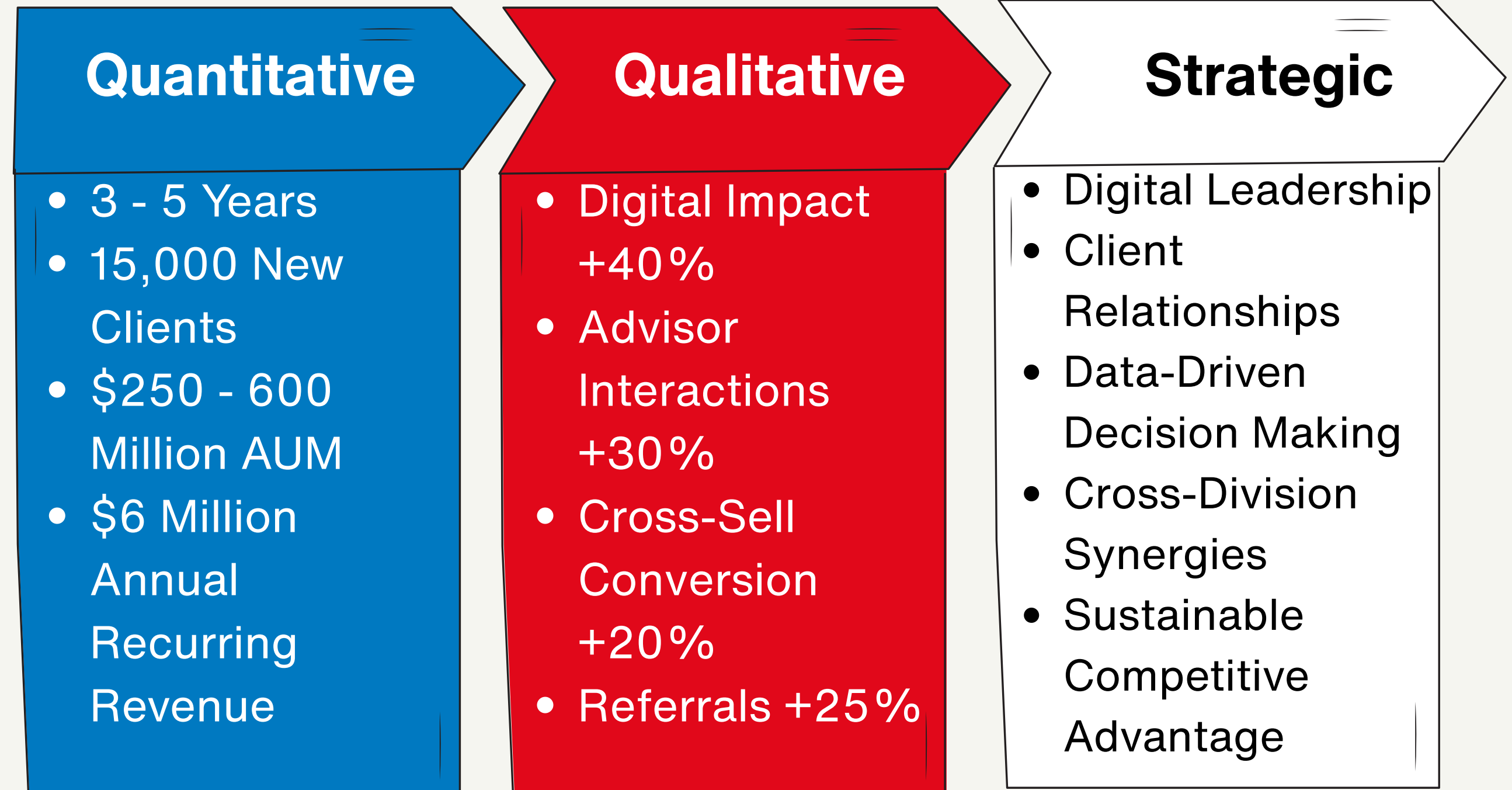
Investment & Return Outlook

**Financial Impact**

Market & Client Growth

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# Market & Client Growth

## Main Marketing Channels

Linkedin, YouTube, Instagram & Partnerships

## Engagement Strategies



### Tiered Membership

- 4 levels: Bronze, Silver, Gold, Platinum
- Different rewards for each tier



### Gamified Rewards

- Sign-in streaks
- Badges & incentives for reaching milestones



### Client Communication

- Progress reports
- Reminders
- Check ins from advisor

# Future Outlook

- App
- Single Client
- Growth



- Ecosystem
- Family Portfolio
- Purpose



# Thank You!

Please feel free to ask us any questions.

