



BMO Wealth Management Selects FactSet as Primary Market Data Provider

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FactSet solutions deployed to BMO Wealth Management professionals to drive digital transformation

NORWALK, Conn., Jan. 26, 2023 (GLOBE NEWSWIRE) -- FactSet, a global financial digital platform and enterprise solutions provider, today announced that it has been selected as the primary market data provider for BMO's Wealth Management division.

FactSet is deploying its modern, flexible Advisor Workstation to BMO Wealth Management professionals across Canada to support its digital transformation objectives.

The implementation equips advisors with FactSet's industry-leading content and analytics within a comprehensive and intuitive web-based interface that enhances BMO Wealth Management's broader technology ecosystem to drive advisor productivity and client engagement efforts.

The expanded relationship with BMO represents another significant win in the wealth management sector, and confirms FactSet's strategy to deliver flexible, robust, and differentiated solutions that power our clients' digital transformation journeys across their wealth enterprise.

"Our collaboration with BMO demonstrates how FactSet's solutions enable enterprise-wide digital transformation and reinforces our commitment to the Canadian market," said Goran Skoko, Executive Vice President, Head of Research and Advisory Solutions at FactSet. "We are thrilled to work with BMO, who is committed to implementing new technologies that will enhance communication, efficiency, and the advisor experience, and drive improved customer outcomes."

"We are pleased to work with FactSet to help drive progress in BMO Wealth Management's digital transformation journey. Together, BMO Wealth Management's professionals will be equipped with the technologies to deliver enhanced client engagement and experiences," said Bruce Ferman, Chief Operations Officer, BMO Private Wealth.

For more information on FactSet's wealth solutions, visit: [Wealth Management Firms | Wealth Management Software | FactSet](#)

About FactSet

FactSet (NYSE:FDS | NASDAQ:FDS) helps the financial community to see more, think bigger, and work better. Our digital platform and enterprise solutions deliver financial data, analytics, and open technology to over 7,000 global clients, including over 180,000 individual users. Clients across the buy-side and sell-side as well as wealth managers, private equity firms and corporations achieve more every day with our comprehensive and connected content, flexible next-generation workflow solutions, and client-centric specialized support. As a member of the S&P500, we are committed to sustainable growth and have repeatedly scored 100 on the Human Rights Campaign® Corporate Equality Index and been recognized amongst the Best Places to Work in 2023 by Glassdoor as a Glassdoor Employees' Choice Award winner. Learn more at www.factset.com and follow us on [Twitter](#) and [LinkedIn](#).

About BMO

Serving customers for 200 years and counting, BMO is a highly diversified financial services provider - the 8th largest bank, by assets, in North America. With total assets of \$1.14 trillion as of October 31, 2022, and a team of diverse and highly engaged employees, BMO provides a broad range of personal and commercial banking, wealth management and investment banking products and services to 12 million customers and conducts business through three operating groups: Personal and Commercial Banking, BMO Wealth Management and BMO Capital Markets.

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