CIBC PRIVATE WEALTH MANAGEMENT

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Kate Lazier is Director of Philanthropy and Legacy Planning at CIBC. As part of our Family Office team, Kate supports ultra-high-net-worth families to plan thoughtful and impactful charitable gifts. This includes helping families focus on the causes that matter most to them and communicating their values to the next generation. Kate leverages her extensive experience in charitable law to advise clients on tax-efficient gifting. She enjoys sharing her knowledge on philanthropy, donor advised funds, private foundations, non-profit governance, gift agreements, social investments and more.

Kate is a lawyer called to the Bar in Ontario. She holds the Certified Financial Planner (CFP) designation. Prior to joining CIBC, Kate spent 15 years practicing charity and non-profit law at a national law firm. She's been recognized for her expertise by the Canadian Legal Expert Directory and Best Lawyers in Canada. She has served on the executive of the Charity and Not-For-Profit Sections of the Ontario Bar Association and the Canadian Bar Association. Kate frequently writes and speaks on charity and non-profit issues.

CIBC Family Office

Our CIBC Family Office offer aims to help ultra-high-net-worth clients and their families manage the complexities of multi-generational wealth. This includes expert guidance in the areas of stewardship, personal financial management, family enterprise advisory and succession planning, and institutional investment management. We look beyond the financials to gain an in-depth understanding of your goals, priorities and values, and how each affect you and your family.

We can help you organize and understand the intricacies of wealth ownership, and ultimately develop a plan that reflects your family's current and future vision.

Our family office services combine the collective experience and expertise of our private wealth team with your other advisors. We welcome a close and collaborative relationship to ensure that all elements of your plan are aligned to provide you with a bespoke and elevated experience.

CIBC Family Office delivers a tailored approach to each individual family. We are responsive to the needs of each member to help you create a lasting legacy for you, your family and generations to come.