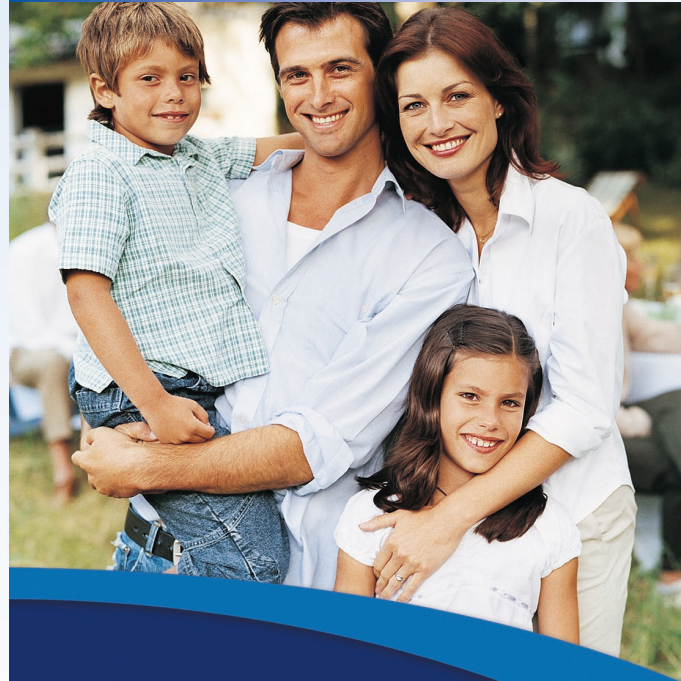


How can we help?

A trust can be simple or complex, but in all cases it is important to obtain professional advice and assistance before proceeding.

We will be pleased to meet with you to discuss your personal situation and how a formal trust will assist you in meeting your goals and objectives. Our representative can provide the information you will need to consider.

When you decide that a trust is the right solution for you, the technical professionals at Concentra Trust will work with you to provide the advice and service required to establish and operate the trust.



trust services

What is a Trust?

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What is a Trust?

A trust is a formal legal agreement that can be a useful and powerful estate planning tool. Ownership of the trust property must be legally transferred to a trustee. The trustee is required to manage the trust property according to the terms established in the agreement and must use that property solely for the benefit of the named beneficiaries.

Why do I need a Trust?

Whether you need to care for someone who has special needs, or you wish to fund a favourite charity, a trust will allow you to accomplish your objectives. It can be used to split income among family members, reduce probate and estate costs and protect assets from creditors.

A trust can safeguard your assets for future generations. It can assist in ensuring your wishes are carried out and your beneficiaries' needs are met.

Factors to consider

Concentra Trust provides you with access to a team of specialists with the time, knowledge and expertise to provide the needed advice and services.

Before creating a trust you need to carefully consider what you wish to accomplish and understand the income tax and legal considerations associated with a trust. You will need to make a number of important decisions, including:

- Who will act as the trustee?
- What property will you transfer into the trust?
- Who will be the beneficiaries, and how will their needs be met?
- Will the trust come into effect while you are still alive or after your death?
- Will the trust be revocable or irrevocable?
- How long will the trust operate?
- How do you ensure appropriate investment goals and objective?

A professional trustee is the answer for those who want to ensure proper control and security over their trust.