



## Estates and Trusts

Concentra Trust specializes in planning and administering estates and trusts, regardless of value or complexity including those with farms and businesses, out-of-province beneficiaries, or difficult family dynamics. The experts at Concentra Trust will ensure commitments and wishes are accurately fulfilled while maintaining sensitivity to needs and concerns of all parties.

- Act as a corporate executor
- Act as an attorney or property guardian
- Perform trustee and trust administration duties

A flagship program, Executor EASE is a unique, flexible service designed to help executors understand and navigate their obligations and responsibilities. Executors can choose from a range of services and select only the options they require.

## Corporate Trusts

Corporate trust solutions include cemetery and funeral trusts, corporate issuances, custodianship, escrows, resource trusts, and fully funded Retirement Compensation Arrangements.

## A Trusted Partner

A national trust company, Concentra Trust provides tailored solutions designed to preserve and transition wealth to future generations. Working with a team of experts, clients can expect personalized service, impartial guidance and peace of mind for all their trust needs, including estate administration and planning, trusts, and registered plans.

- Assets Under Administration: \$27.1 Billion
- Executor/Trustee Appointments: 21,500+
- Over 60 employees dedicated to delivering trust solutions

Concentra Trust is a wholly-owned subsidiary of Concentra Financial Services Association.

## Registered Plans

Registered plans make it easy for Canadians to save for long-term goals and retirement. Concentra offers a range of registered plan programs to organizations backed by a team of experts that support the administration and delivery of these products to your clients.

*The strength of Concentra comes from deep roots in the co-operative system, built on shared values to grow and serve communities across Canada.*