

Trustee and Trust Administration

A trust is a method of holding and protecting assets, and can be used for many purposes such as providing a gift to a minor or ensuring for appropriate care and financial security of a spouse or disabled child. Selecting a trustee to manage the trust is a critical decision. We've been providing professional services and the administration of trusts for over 60 years. Our professional team is here to help when you need us.

Powers of Attorney and Property Guardianships

A power of attorney can grant authority to an appointed person or trust company that handles a person's financial affairs in the event of mental incapacity. For most individuals, this can be a time-consuming and often frustrating role. Even more time consuming and frustrating is when there's no power of attorney in place when incapacity occurs, requiring a lengthy and costly court application to have a guardian or committee named. Having a corporate attorney or guardian such as Concentra Trust gives you access to professional management services rather than relying on a family member or friend when the need arises.

Experts in estates and trusts for over 60 years.

Concentra. The name to trust.

Concentra Trust is a national trust company specializing in estate and trust solutions for over 60 years. The strength of Concentra comes from deep roots in the co-operative system, built on shared values to grow and serve communities across Canada.

We specialize in personalized service, impartial guidance and peace of mind for Canadians.

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Concentra[®]

TRUST

Estate and Trust Services

Tailored Solutions to Manage and Transition Wealth





Concentra Trust administers a full suite of estate and trust solutions of all sizes and complexity for clients across Canada. Our team of trust specialists has the experience and expertise you would expect from a national trust company.

What we offer

Our estate and trust solutions are designed to meet your individual needs. We are committed to finding the right solution, no matter how complex the circumstance and regardless of estate size. We work with all clients, not just those with high net worth.

Our fees are competitive with other national trust companies. Whenever possible, we'll provide full disclosure of administration fees in advance.

Estates and Trusts

Administering an estate while grieving is an emotionally charged experience. Whether you are planning your own estate or dealing with a loved one's death, we offer a wide range of solutions for the effective planning and transfer of assets to the next generation.

We are committed to exceptional service. Here is what you can expect working with Concentra Trust for your estate and trust needs:

- invaluable assistance at a time of grieving
- help when family members are not local, willing or able to act
- impartial administration for complex family dynamics
- professional asset administration
- longevity of trustee relationship
- mitigation of personal liability for individual executors

Selecting the Right Executor

You've spent your lifetime acquiring and safeguarding assets. With the help of Concentra Trust, you can name your executor, plan your estate and ensure your assets are distributed according to your wishes. Keep in mind, naming a family member or friend as executor isn't always the best choice. In certain circumstances we recommend using the services of a corporate executor. Why? Because dealing with complicated duties, probate matters, claims and debts can be overwhelming. The list of duties is long, and there is the potential for personal liability that can be incurred by executors. We can handle all of that, in an impartial, efficient and caring manner.

Executors and Estate Administration

Being named an executor is a serious commitment. It can be a new and challenging experience, often charged with emotion and complicated by the process of grieving. Where do you begin? Concentra Trust can offer executors a little or a lot of help, whatever's needed at the time. Our team is professional, compassionate and understanding. Together we will focus on the things that matter most.

Executor EASE

One way Concentra directly assists executors is with Executor EASE, a unique support program that helps executors understand the duties and responsibilities that come with the role. Working directly with the executor, we customize our solutions to fit their needs through our menu-based administration service. The flexibility allows executors to pick only the services they need; that may include preparation of the probate application or assistance with all of their executor duties.

Our team works with estates of all sizes and we can be retained at any time during the estate settlement process.

Executor EASE offers:

1. a no-cost, no-obligation consultation with experienced professionals
2. easy access to expert guidance and non-legal advice, and
3. the flexibility to select only those services required, whether the estate is simple or complex.