



# Trusts and Trustees

Tailored solutions to manage and transition wealth

Concentra®  
TRUST

## What are some types of trusts?

- Absolute discretion trusts, also known as Henson trusts
- minor/adult children
- charitable remainder
- spousal or common-law partner
- alter ego/joint partner
- insurance

## Can Concentra Trust help?

Absolutely. Trustees must have the knowledge and skill to operate within the terms of the trust agreement. They are responsible to the beneficiaries for what occurs during the course of the administration. Virtually every decision related to the set up and operation of a trust will have tax implications. Trusts are a complex legal area and the need for professional assistance cannot be over-emphasized.

Concentra Trust can act as a sole, co or alternate trustee. We administer a full suite of estate and trust solutions for trusts of all sizes and complexity for clients across Canada. Our team of trust consultants has the experience and expertise you expect from a national trust company. Concentra Trust is happy to offer complimentary safekeeping for your Will, trust indenture, or power of attorney.

**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 asset size.**

## Concentra. The name to trust.

Concentra Trust is a national trust company specializing in estate and trust solutions for over 65 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.

Concentra Trust is a wholly-owned subsidiary of Concentra Bank.