



Executor and Estate Administration

Whether you are planning your own estate or dealing with a loved one's death, Concentra Trust offers comprehensive solutions for the effective planning, management and transfer of wealth to the next generation. Accepting an appointment to be an executor is a serious commitment with significant responsibilities. Concentra Trust provides invaluable experience at a time of grieving to complete the myriad estate administration duties in an impartial and professional manner.

The activities associated with settling an estate can be time-consuming and demanding, including:

- Arranging the funeral and communicating with the estate beneficiaries
- Identifying and locating assets and liabilities to apply for probate
- Managing claims, expenses and creditors
- Safeguarding and consolidating a diverse range of assets including personal property, investments, real estate holdings, business interests and digital assets
- Properly distributing the assets in accordance with the Will and applicable legislation
- Filing all necessary tax returns

Concentra Trust offers a full range of services or the ability to select discrete duties and administrative tasks to efficiently and accurately settle an estate. Executors can be held personally liable for errors made in administering an estate. We are well versed in navigating the intricacies of estate planning and administration and our team of experts has the skill to support any or all aspects of the entire process.

For more information, contact:

1.800.788.6311 | trust@concentra.ca | concentra.ca

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, ensuring for appropriate care and financial security of a spouse or disabled child, supporting philanthropic objectives, supplementing retirement benefits, or holding assets such as cottages and private businesses that are to be managed over the course of multiple generations.

With our extensive experience in establishing and administering customized and complex trusts, Concentra Trust is able to provide continuity of trusteeship over the lifespan of a trust.

As a boutique trust company, Concentra Trust is unique in the industry as we do not provide in-house investment management services. Clients can take confidence in our specialized skills and dedicated focus to trust administration, without

any potential conflicts of interest in managing the underlying trust investments. We operate with the highest level of integrity and are unbiased in our oversight of trust assets. This gives us the ability to have open architecture and partner with the best in-class, highest-performing financial managers to deliver responsible investment protection and growth of the trust portfolio.

We are honoured by those who choose [Concentra Trust](#) to be their partner in their estate and trust planning journey. Helping families settle their estates, administer their trusts and manage their wealth is our passion. We look forward to the opportunity to share and discuss personalized fiduciary solutions that support your objectives and needs.

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