

WELLINGTON-ALTUS

THE ROLE OF A CORPORATE TRUSTEE OR EXECUTOR? WHEN? WHERE? WHY? HOW?

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AGENDA AND SPEAKER INTRODUCTION

1. Client scenarios and events
2. Nature of services provided by a Trust company
3. Who is Concentra/Wyth Trust?
4. Questions



Client scenarios and events – When should a Corporate Trustee or Corporate Executor be considered?



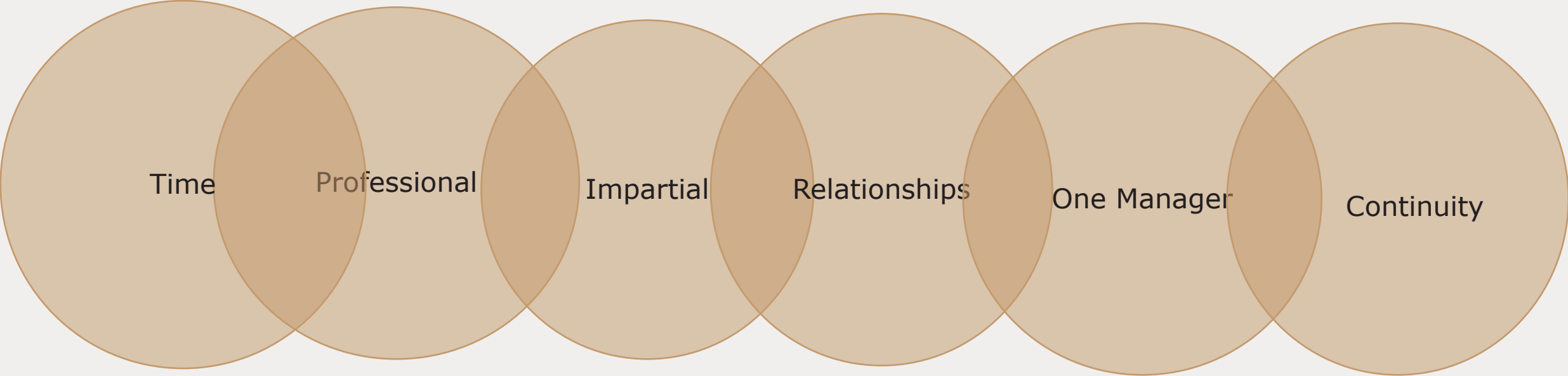
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Case Study #1

Paul and Mary - One child named Mark

- ✓ Mark lives in a condo purchased by his parents – Paul and Mary
- ✓ Paul and Mary fund Mark's everyday expenses
- ✓ Mark has graduate degree but struggles with addiction
- ✓ Paul has recently passed away and Mary has been left to deal with Mark's day to day living needs and expense
- ✓ Mark is demanding more funds and becoming verbally abusive towards Mary

The benefits of a Corporate Trustee

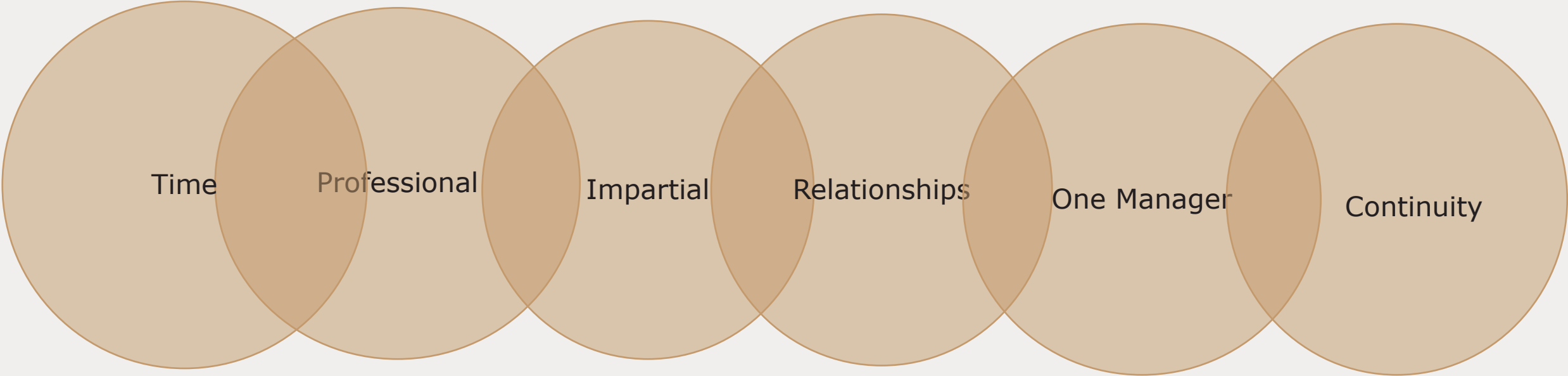


Case Study # 2

Paul – 62 years old

- ✓ Never married, no children
- ✓ Father passed away over 25 years ago
- ✓ Mother passed away last year
- ✓ Paul was their only child and was his mother's executor
- ✓ Paul was planning a move from Ontario to Alberta
- ✓ Paul was diagnosed with a significant illness and died soon after

The benefits of a Corporate Executor



Estate Planning Referral Triggers



Estate Planning Referral Triggers



Background and Asset Triggers

- ✓ Non-Canadian citizenship
- ✓ Born or worked outside of Canada
- ✓ Philanthropic objectives
- ✓ Desire to leave legacy through generations (cottage, family company)
- ✓ Owns investment holding companies, operating companies and joint ventures or partnerships
- ✓ Assets located outside or province or country
- ✓ Secondary or rental properties
- ✓ Illiquid assets or limited access to cash
- ✓ Stock certificates
- ✓ Insurance policies
- ✓ Joint assets with adult children or non-spouses

What services does a Trust company provide?



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Wyth Trust is a trade name of Concentra Trust



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Estate Planning Solutions

Corporate Appointments



Planning Solutions



Agent for Solutions



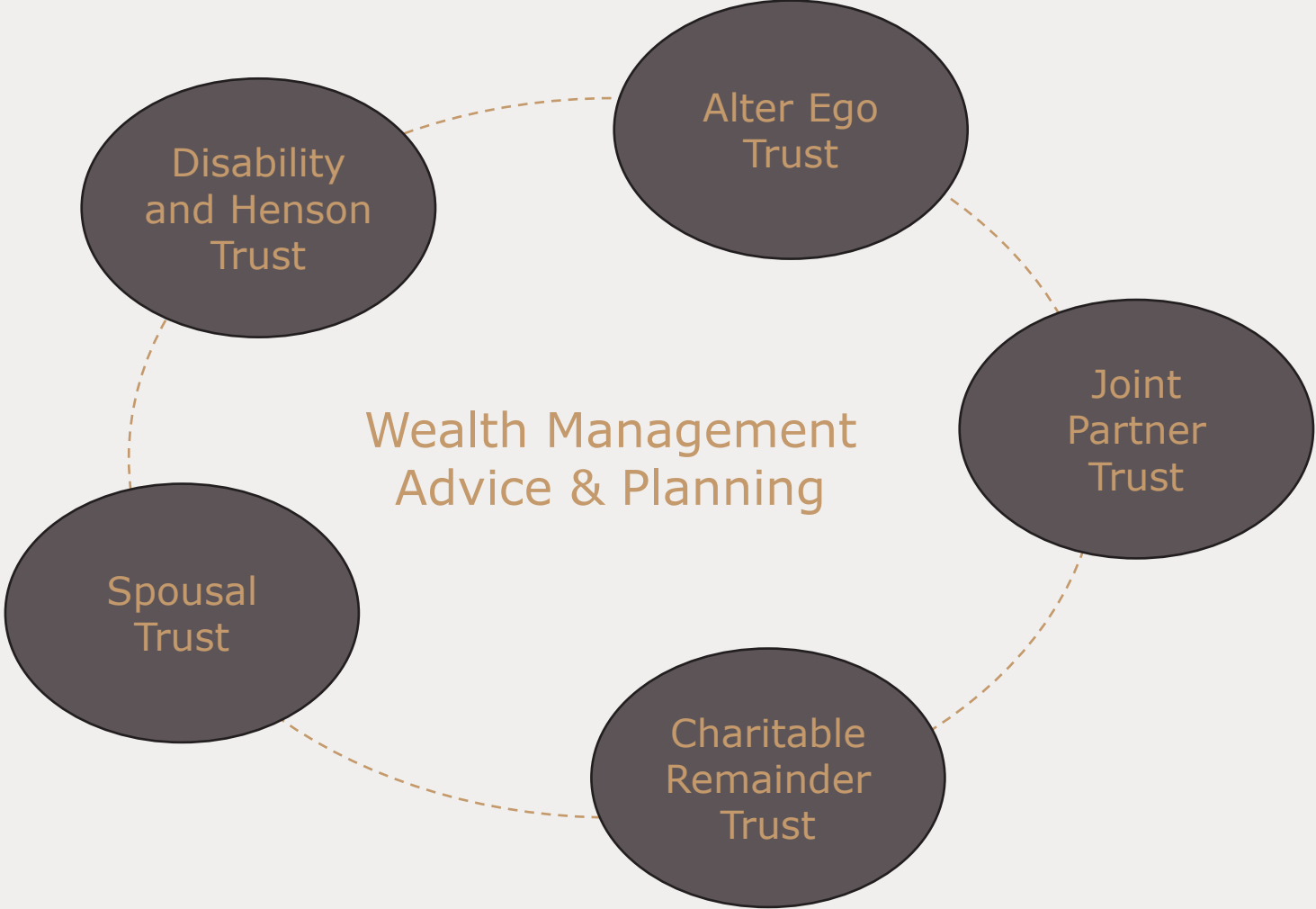
Post Planning Solutions



Court Appointment



Trust Solutions – Testamentary and Inter-Vivos



Who is Concentra/Wyth Trust?
What is the process to refer and work together?



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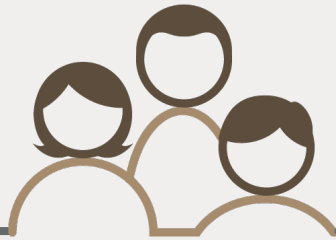
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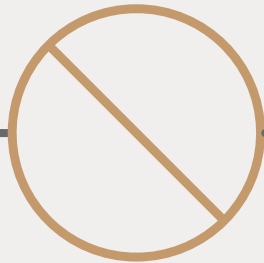
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What sets us apart



Diverse clients with unique assets and complexities



No requirement to custody assets

No proprietary, in-house investment solutions



Referring advisor continues to manage the client relationship and assets

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Questions?