

Truvera Trust Corporation - A Guide to Our Services for Legal and Other Professional Service Providers



Who We Are

At Truvera Trust Corporation (“Truvera”) we provide estate and trust services for individuals, families, and businesses. We work in conjunction with British Columbia legal professionals, financial advisors and planners to assist with and maintain the estate, trust and financial planning services that you provide your clients. We offer very competitive rates.

We are an independent British Columbia owned trust company which has been operating since 2005 with offices in Vancouver and Kelowna. We’re incorporated under BC’s Financial Institutions Act and regulated by the Financial Institutions Commission of BC.

The advisors at Truvera are highly skilled professionals who have years of prior experience in senior partnership and managerial positions with major international accounting firms such as PricewaterhouseCoopers, KPMG and Deloitte, as well as financial institutions and law firms.

We are committed to working with clients through all stages of their financial lives.



Truvera Trust Corporation

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What We Offer Your Clients

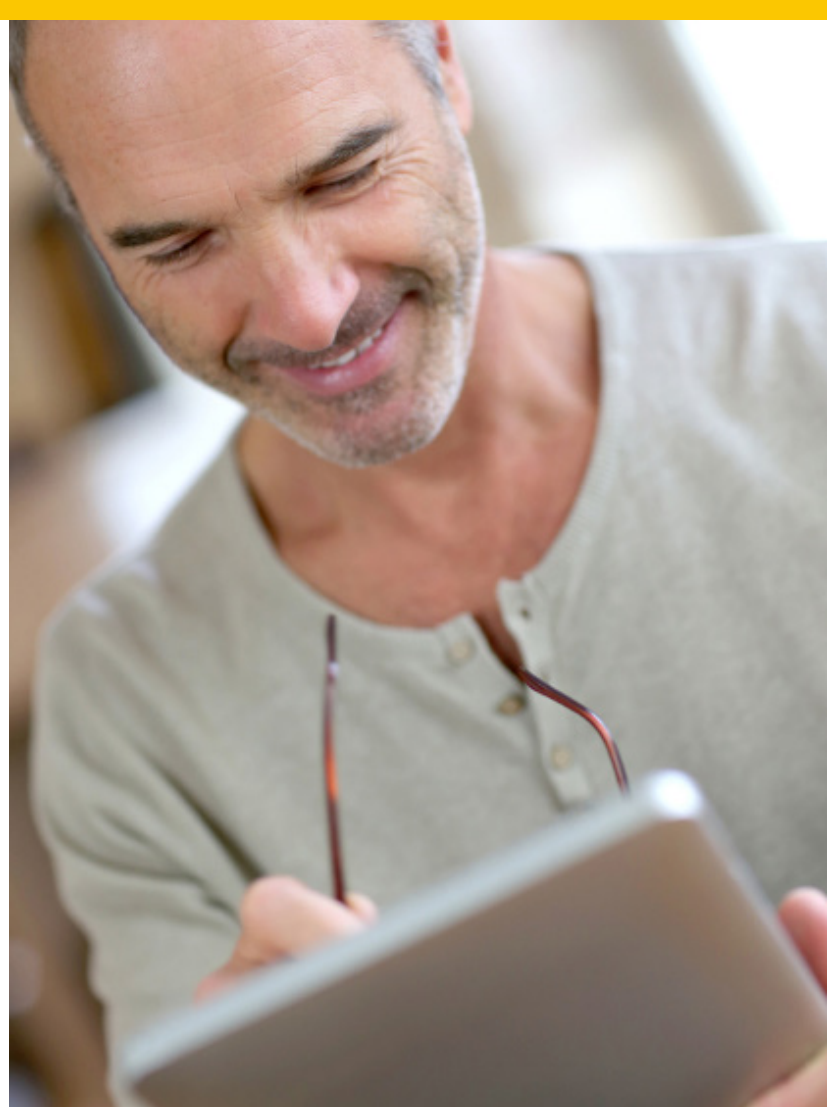
- ✓ **Executor, Co-Executor and Alternate Executor Services**
When appointing relatives does not make sense
- ✓ **Trustee, Co-Trustee and Alternate Trustee Services**
When Trustee Services are required during lifetime for Inter Vivos Trusts or after death for Testamentary Trusts
We provide Trustee services for all types of trusts, including Senior Trusts such as Alter Ego Trusts and Joint Partner Trusts
- ✓ **Agent for Executor and Agent for Trustee Services**
When your client needs professional assistance with their responsibilities as an Executor or Trustee
- ✓ **Court Appointed Administrator of a Will Services**
When your client dies without a valid Will in place
- ✓ **Agent for Administrator**
When your client needs professional assistance with their responsibilities as a court-appointed Administrator of a Will

- ✓ Enduring Power of Attorney Services
When your client is unable to administer their own legal and financial affairs
- ✓ Court Appointed Committee of the Estate
When your client becomes mentally incapable and has no Enduring Power of Attorney in place
- ✓ Retirement Compensation Arrangement (RCA) Trustee Services
When your client needs a Trustee to provide administration, accounting and tax services for their RCA
- ✓ Escrow Account Services
When your client needs their assets held in safekeeping until a contract is successfully completed
- ✓ Business Succession Planning
Finding the right strategies for your client to maximize personal financial security and asset value on the transfer of business ownership

For Further Information

Truvera produces the following documents to describe the range of services we provide:

- *Truvera Trust Corporation - An Overview of Our Services*
- *Developing Your Estate Plan*
- *Writing and Updating Your Will*
- *What to Expect as an Estate Beneficiary*
- *Our Executor Services*
- *Our Agent for Executor Services*
- *Our Trustee Services*
- *Our Agent for Trustee Services*
- *Our Enduring Power of Attorney Services*



Our Contact Information

Our team of advisors at Truvera is made up of respected professionals with years of specialized expertise. We can provide peace of mind with our competent, compassionate personalized assistance and we'd be happy to speak with you to discuss your needs.

Visit our website at www.truvera.ca and call us at **778-379-3933** or e-mail us at info@truvera.ca to set up a complimentary, confidential consultation.



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Disclaimer: Please note that the information provided in this overview is general in nature only and does not constitute legal, tax, accounting or investment advice. Information in this document is believed to be reliable at the time of writing but Truvera Trust Corporation cannot guarantee its accuracy or completeness; accordingly, we take no responsibility for future changes in legislation; and we offer no protection against any losses arising from any individual's actions relying on this information. No part of this document may be reproduced, transmitted or distributed in any form or by any means without obtaining written consent from us.

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