

TRUVERA TRUST CORPORATION

AN OVERVIEW OF OUR COMPANY

We ensure that your estate and trust plans will
be administered in accordance with your wishes



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Overview



Following is an overview of our fiduciary services.

Please let us know if you would like more detailed information and we will be happy to provide you with any of our information sheets on :

- *Our Trustee Services*
 - *Our Executor Services*
 - *Our Power of Attorney Services*
 - *Our Financial Committee Services*
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- *Agent for Trustee Services*
 - *Agent for Executor Services*
 - *Agent for Power of Attorney Services*

We help clients in need of an executor, trustee or attorney. Acting as an Executor or Attorney for a loved one can take an emotional toll and is consuming and technical in nature. The responsibilities of the job begin at the worst possible time - in the grief, the loss or the anxiety of an illness or accident. Trust us to ease this burden.



About Us

Truvera Trust Corporation is an independent British Columbia-owned trust company which has been operating since 2005 and has offices in Vancouver and Kelowna. We are incorporated under BC's Financial Institutions Act and regulated by the Financial Institutions Commission of BC. We specialize in providing clients with estate and trust administration services.

The advisors at Truvera are highly skilled professionals who have extensive 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. Our experience includes advice to individual and corporate clients on accounting and tax planning, investment management, insurance products, creditor protection, corporate management practices, mergers and acquisitions, business structures, business succession planning, business valuation, selling a business, dispute resolution, personal financial planning, and estate and trust planning and administration.



Our Services

Executor Services

- *Executor or Co-Executor of your Will*
- *Alternate Executor*
- *Agent for Executor providing assistance to the Executor of your Will*
- *Court appointed Administrator of your Will*
- *Agent for Administration providing assistance to the Administrator of your Will*

Trustee Services

- *Trustee or Co-Trustee on your trusts during your lifetime or after death*
- *Alternate Trustee*
- *Agent for Trustee providing assistance to your Trustee*

Power of Attorney (POA) Services

- *Pay bills and credit card expenses*
- *Provide funds to dependents*
- *Make gifts, loans or charitable donations*
- *Make mortgage payments, pay property taxes*
- *Pay insurance premiums for home and property insurance, auto insurance, medical/dental insurance and life insurance*
- *Make registered account contributions and required withdrawals*
- *File income tax returns and make income tax payments*
- *Manage investment accounts*
- *Sign personal care or property management contracts*

There are countless hidden traps and missed savings involved in these processes. Common missteps include improperly interpreting a will, failure to notify all possible heirs, losing tax status when paying expenses, not maximizing value on a sale, distributing before the 210 day limit or failing to keep detailed records. Our extensive experience and comprehensive knowledge will ensure that you and your loved one's affairs are properly taken care of.



Why Truvera?

We tailor our involvement based on your needs.

We provide personal, compassionate assistance as we help clients manage their financial affairs and we develop customized plans to meet their specific needs. We offer one of the lowest professional fee structures in BC for our services.



- Independent from large financial institutions
- Little bureaucracy
- Supporting BC credit union members
- Flexible and competitive fee structure
- Expertise gained from legal and financial institutions



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Testimonials

Our clients mean the world to us. Truvera writes the books in estate law, we have the highest level of accounting and trust advisors and we provide nimble and direct decision making. We not only provide this adept care, but we do so on a local and personal level.

"Recently one of our more senior clients said he would like someone other than a 1-800 number to talk to. I told him about Truvera Trust and [recommended] them because of their local presence, their costs are lower, and they do not manage money. They can act as your POA and trustees/executor and you can meet with them face to face. [...] He was pleased that there was someone he could talk to in person. I introduced him to Ian [Williamson], [...] and our client feels more comfortable with having someone local that can look after things when he knows he can no longer do so. What was also important was that I have a good working relationship with Ian and understand the client's wishes, so the plan that he has in place [...] will be followed."

- Bob White, CLU, Group One Planning Solutions

"We have dealt with Truvera Trust Corporation for many years. They are the appointed executor for many of our clients. They have experience and skills and make the effort to do a very professional job."

- Richard Montgomery, Montgomery Miles Law Firm

"I have had the opportunity to work with Ian Williamson and Truvera Trust since inception both as a CA and CPA in Public Practice and as the Executor of several Estates. In all circumstances, I have found Ian to be professional, practical and knowledgeable with high ethical standards. I would not hesitate to recommend Truvera should the occasion arise in the future and have done so in the past."

- John McCormack, Retired Partner at MNP

Truvera can provide peace of mind with our competent, compassionate personalized assistance. We would be happy to speak with you to discuss your needs.

Visit our website at www.truvera.ca,
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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