



SOLUS TRUST

AN AFFILIATE OF **RAYMOND JAMES**



**Building
meaningful
legacies.**

Your legacy.

It can be tangible such as your wealth and intangible such as your values. It is what you pass on. Your wealth and your values can be inherited, nurtured, and grown over time.

Creating your legacy should consider both what you wish to achieve during your lifetime and what you wish to pass on to future generations.

We are here to support and help you build a meaningful legacy.





**We provide a guiding
hand to help carry out
a plan for your future.**

Who We Are

Every life has milestone talks.

Discussing how to transfer your wealth is one of them. It's a serious conversation to have with people you can trust. People who really care and take the time to understand what truly matters to you. We provide a guiding hand, and create a plan for your future.

Welcome to Solus Trust.

Whether acting as executor, trustee or power of attorney, our team of specialists have a wealth of experience to help you navigate the complexities of estate planning.

We take pride in fostering relationships based on trust, genuine care and empathy, and aligning our solutions with your personal values and objectives, not ours.

Our goal extends above and beyond safeguarding your assets. We are committed to assisting with preserving family harmony, ensuring diligent care of your beneficiaries, and facilitating your legacy for generations to come, easing the burden on you and your loved ones.



How We Help

We listen.

We take the time to listen and review your goals and challenges before we offer any advice. Only when we understand you and your unique situation, will we offer advice regarding important decisions to be made that will impact your estate and trust planning.

We work as a team.

Everything we do is centered on teamwork. Together, with your team of professional advisors, we will work in partnership to provide you with the best possible solutions.

We are committed to service excellence.

We are dedicated to maintaining the highest levels of professionalism and confidentiality in all our interactions. We pride ourselves on going above and beyond to exceed your expectations because the ultimate measure of our success is your satisfaction.

What We Do

Protecting your wealth and building your legacy.

We offer solutions designed to facilitate, manage, protect and transfer your wealth.

We provide advice and guidance to ensure that your estate planning objectives are achieved with care and professionalism.



EXECUTOR SOLUTIONS



POWER OF ATTORNEY SOLUTIONS



TRUSTEE SOLUTIONS



SIMPLIFY BILL PAYMENT SERVICES







EXECUTOR SOLUTIONS

We understand the emotional weight that accompanies the passing of a loved one, and that being appointed as executor can be both an honour and a burden. When you are appointed and choose to carry out the role of the executor it is an enormous responsibility, one that carries personal liability. Making sure you have the time, knowledge and support to fulfill your duties is key.

We are here to assist you in carrying out the administration of an estate. You remain in the executor role and we do the work to ensure your duties are fulfilled. Choosing Solus Trust as your professional executor ensures your estate is administered with care and efficiency, easing the burden on your family and your heirs.

Have you been appointed as executor?

Our team of specialists work with you and your professional advisors to assist with the review and planning of your will and estate documents to ensure that, when the time comes, your estate is handled with diligence and care.

Executor responsibilities:

- **Safeguard the estate assets**
- **Administer and report in a timely and accurate manner**
- **Manage relationships with the beneficiaries**
- **Ensure financial, legal and tax requirements are fulfilled**
- **Obtain appropriate discharges and clearance certificates**



POWER OF ATTORNEY SOLUTIONS

When contemplating the possibility of being unable to make decisions for yourself, it becomes vital to plan for the future. A power of attorney grants someone you trust the authority to make decisions on your behalf, for both the care of your person and to administer your property.

In tandem with an executor appointment, Solus Trust can be appointed as your power of attorney for property. Our team of specialists will work alongside your personal care attorney to make certain that your property is safeguarded and used to ensure your care and well-being are prioritized.



TRUSTEE SOLUTIONS

Establishing a trust can provide many unique opportunities when contemplating your legacy and wealth transfer goals such as:

- **Control over the distribution of your wealth over time**
- **Minimize taxes and probate costs**
- **Protect the assets intended for a vulnerable beneficiary**
- **Preserve the privacy of your gifts**

Why consider a professional trustee?

Our trustee services provide long-term solutions to preserve your wealth and safeguard your legacy.

Choosing Solus Trust as your professional trustee ensures your trust is administered according to your wishes. We carry out our fiduciary duties with knowledge, integrity and always with an impartial approach.

Our experienced team of specialists will work with your professional advisors to ensure your trust is administered according to your wishes during your lifetime, or for future generations.

SIMPLIFY BILL PAYMENT SERVICES

Solus Trust's Simplify bill payment services are specially designed to relieve you of the day-to-day management of your personal finances, providing support with:

- **Bill payment**
- **Income receipt**
- **Processing**
- **Record keeping**
- **Important document review**
- **Tax preparation coordination**

With our dedicated assistance, you can focus on what truly matters while we ensure the finer details of your finances are administered with care and diligence.



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