About Us

Legacy Private Trust is a management-owned trust company whose roots in the industry and working with trusts & estates dates back decades. As a trust company, we are federally licensed and regulated by the Office of the Superintendent of Financial Institutions. Our Trust & Estate Services represent a natural coming together of our decades of experience working with trusts and working with clients in a time of need to ensure long-term success. Our approach is focused primarily on highly personalized service. Our model has proven to be one which molds to our client's specific needs – not the other way around.

Next Steps

For more information on Trust & Estate Services or about Legacy Private Trust, please contact us. We would be pleased to schedule a phone call or meeting with you to discuss your needs and plans and work with you to see if we can help.

LPT LEGACY PRIVATE TRUST

Ask to be directed to or contacted by:

Trust and Estate Consultant
Phone: 416-868-0001
Email: info@legacyprivatetrust.com

Trusts • Estates • Agencies • Guardianships • Foundations • Tax and Accounting Services

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Trust & Estate Services

Immediate Need Services

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For those with an immediate need for trust and estate administration, Legacy Private Trust is pleased to offer our boutique Trust & Estate Services. We can be appointed as a trustee in a trust agreement, hired to act as an agent to an individual acting in a fiduciary role or become involved through a court appointment process. Below is an outline of our immediate need services in more detail:

Trustee Services

Trusts can be created and administered during your lifetime to achieve many important objectives such as tax planning, asset protection, ensuring a responsible inheritance, to maintain confidentiality, to eliminate conflicts of interest and to achieve many other goals. Examples include:

- Family Trusts
- Blind Trusts
- Retirement Compensation Arrangements
- Alter Ego Trusts
- Spousal Trusts
- Charitable Foundations
- Personal Injury Trusts

Agent Services

Individuals commonly become overwhelmed and require professional assistance as a result of acting in a fiduciary role, whether under a Power of Attorney for Property; a Last Will and Testament or Codicil, and/or a Trust Agreement. As an agent, our firm can assist by utilizing our team of experienced professionals as well as important soft skills for the important task of relationship management with family members and beneficiaries.

- Agent for Attorney for Property
- Agent for Executor
- Agent for Trustee

Court Appointments

Situations arise where no individual is able or willing to act in a fiduciary role. In these cases, judges may issue a court order appointing a trust company to act as fiduciary. Legacy has experience acting in the following court-appointed scenarios:

- Estate Trustee During Litigation
- Successor Estate Trustee
- Successor Trustee
- Guardian for Property

How We Help

Service

- Superior service thanks to Legacy's unrivaled service model made possible by our unique staff to customer ratio. Legacy's total number of client relationships is intentionally in the few hundreds, meaning you will always be an important and valued client to us.

Continuity

- Service continuity is achieved through the owner-management of Legacy Private Trust.

Experience

- Work with a trust company whose roots in the trust industry date back to the 1960s.

Independence and Focus

- We are an independently-owned financial institution with a focus on fiduciary services only. We are not distracted by cross-selling other financial services.

Collaboration

- We are always pleased to work collaboratively with our clients' existing advisors, such as lawyers, accountants, investment professionals and others.

Education

- We provide financial, trust/estate and investment orientation for our clients when we are acting as an Agent.

Reporting

- We produce, deliver and explain reports to our clients and beneficiaries regularly and at request.

Transparency and Accountability

- Our fully transparent fees are competitive with industry standards.
- Corporate trustee's fiduciary duty ensures accountability and that decisions are made in the best long-term interest of the beneficiaries.