

## About Us



At Legacy Private Trust we have over 200 years of professional experience administering trusts and are an approved trustee by the Cemeteries Registrar. As a trust company, we are federally licensed and regulated by the Office of the Superintendent of Financial Institutions. We have been actively administering many Care & Maintenance Trusts for several years and are a small, family owned and operated trust company focussed primarily on highly personalized service.

## Next Steps

For more information on this service or about Legacy Private Trust, please contact us. We would be pleased to schedule a phone call or meeting with you to discuss your Cemetery's situation and work with you to see if we can help.



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### Contact Us

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Care and Maintenance Trusts

## Cemetery Services

# Care and Maintenance Trusts

Through discussions with Cemeteries over the years we found that their care and maintenance costs have increased disproportionately to the income yields of their trusts. Through our analysis we have found this is primarily due to poor investment and high fees.

We don't think that's good enough and know that the legislation allows your trusts to invest in more than just low yielding investments. Care & Maintenance Trusts by Legacy Private Trust allow you to earn more to cover your care and maintenance expenses through competitive fees and higher investment yields.

Many cemetery trusts have been drawing excessive and unsustainable income while depleting their capital base through continuous increases in inflation. This often puts their entire fund at risk of being inadequate in the long-term. Our goal is to find long-term, sustainable and adaptable trust strategies that can work for our cemetery clients today and into the future.

## About Care & Maintenance Trusts at Legacy Private Trust

- Required under the new Funeral, Burial and Cremation Services Act
- Are not and should not be limited to low yielding investments
- Higher yields are available through conservative investing
- Trust capital should be preserved and grow beyond inflation rate
- Legislative requirements exist for use of the income and the capital portions of these trusts
- Fees are competitive with industry standards
- Must be administered by an approved trust company
- Full transition implemented by our professionals in cooperation with the Cemeteries Registrar

