

## About Us



Legacy Private Trust is a family owned and operated trust company whose roots in the trust industry date back to the 1960s. As a trust company, we are federally licensed and regulated by the Office of the Superintendent of Financial Institutions. We have been actively administering Cemetery Trusts for years and are focused primarily on highly personalized service. Our model has proven to be one which molds to our clients specific needs – not the other way around.

## 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.



**LEGACY**  
PRIVATE TRUST

### Contact Us

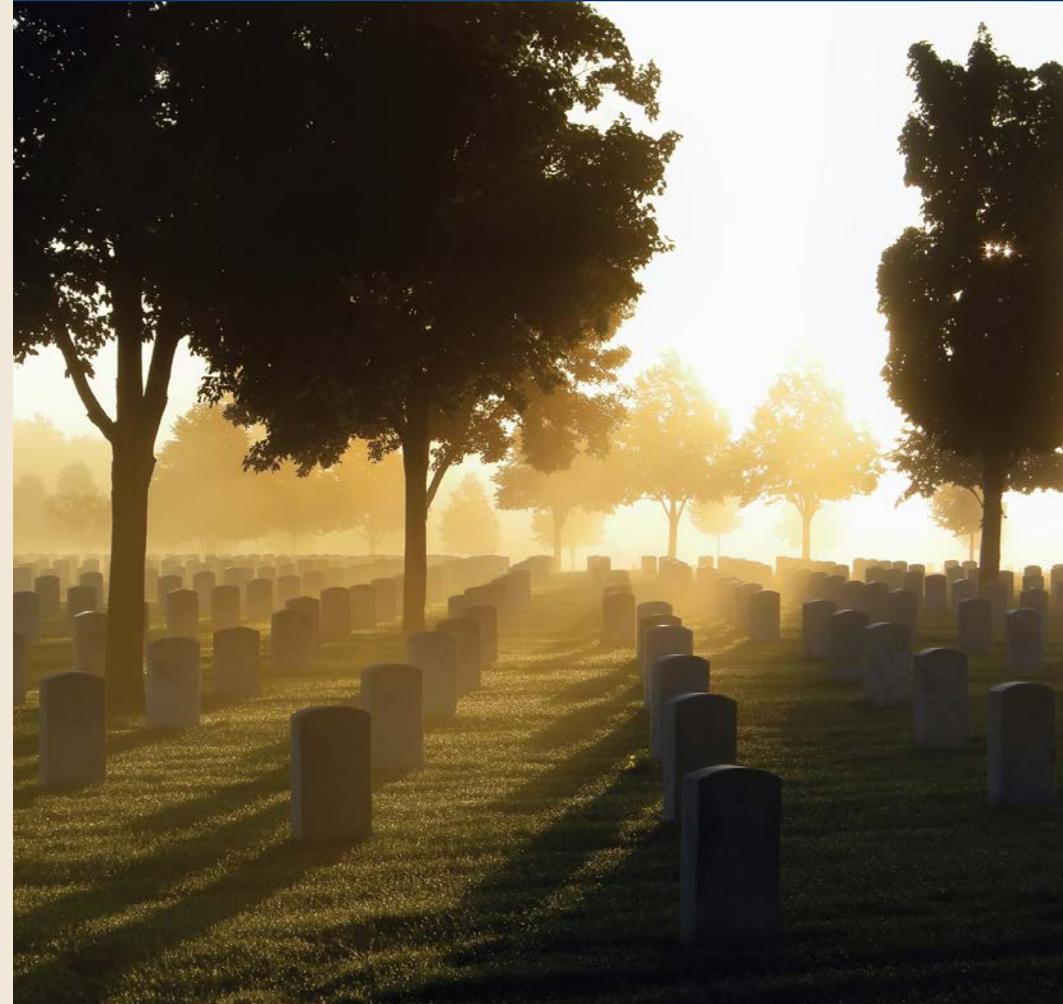
**Mike Love**

Phone: 416-868-4286

Email: [mbl@legacyprivatetrust.com](mailto:mbl@legacyprivatetrust.com)



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Trusts • Estates • Agencies • Guardianships •  
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[www.legacyprivatetrust.com](http://www.legacyprivatetrust.com)

1 Toronto Street, Box 1, Suite 800, Toronto, ON M5C 2V6

Cemetery Trusts

## Cemetery Services

# Cemetery 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. Cemetery 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 Cemetery Trusts at Legacy Private Trust

- Required under provincial legislation
- 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 fully transparent, and are competitive with industry standards. Clear, direct accountability and legal duty of good faith is ensured through a professional and regulated trustee relationship
- Must be administered by an approved trust company
- Full transition implemented by our professionals in cooperation with provincial regulators
- Superior service thanks to Legacy's untouchable service model made possible through our unique staff to customer ratio. Service continuity is achieved through family ownership and operation of Legacy Private Trust
- Work with a trust company whose roots in the trust industry date back to the 1960s
- We provide support for annual regulatory filings

