Legacy Private Trust helps small to medium size organizations with full back office support. With this covered, boards, staff and volunteers can focus on strategic initiatives that keep the organization fresh and at the forefront of donors', supporters' and participants' minds. Using these services also ensures board continuity in service and reporting and allows for a strong succession plan in your back office.

About Us

With over 200 years of experience in the industry, our team of experts specializes in the management and administration of trusts, estates, guardianships and foundations for high net worth Canadians and institutional clients.
We have harnessed this experience, in conjunction with our superior service model, to provide our clients with a personalized level of service found nowhere else. Whether we use our talents to work through a complex estate, act as an objective third party, provide guidance for a weary executor or trustee, or support the unique needs of our client's beneficiaries, our model has proven to be one which moulds to our clients' specific needs – not the other way around.

LEGACY PRIVATE TRUST

Contact Us

Phone: 416-868-0001
Email: info@legacyprivatetrust.com

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

www.legacyprivatetrust.com
35 Madison Avenue, Toronto, ON M5R 2S2

LEGACY PRIVATE TRUST

Charitable Foundation & Non-Profit Services

Our professionals provide accounting services, tax services, investment oversight services, donor management and financial reporting

Accounting Services

Bookkeeping services include:

- Preparing cheques
- Making supplier payments
- Recording donation entries
- Charging monthly credit card donations
- Completing bank reconciliations
- Making grant or program payments

Tax Services

Tax services can vary and may include:

- Preparing tax returns
- Preparing information returns
- Providing alignment with and calculation of annual disbursement quotas

Investment Oversight Services

Strong & sound investment oversight is available for:

- Operational accounts
- Specific bequest funds
- Endowment funds (including establishment of the fund)
- Trust funds
- Bursary funds
- Grant and scholarship funds

Donor Management

This service can vary and may include:

- Monthly fundraising reports
- Campaign reports
- Database breakdowns to target specific donor groups
- Planned giving support

Financial Reporting

Reporting services vary and may include:

- Monthly financial reporting
- Monthly investment reporting
- Monthly fundraising reporting