



What is a Trust Company?

A trust company is an institution that exists to administer trusts and estates, as well as assist in general asset management. Trust companies can act as executor, trustee or attorney for property, and can also operate as agent for those acting in these capacities. Importantly, trust companies are allowed to act as fiduciaries. This means that trust companies may take on a role, such as executor or trustee, where they are tasked with holding and managing assets for the benefit of another individual. A fiduciary owes a duty of care and of loyalty to the individual for whom they hold assets, and must always act in that individual's best interests. Because they routinely act in a fiduciary capacity, trust companies are strictly regulated.

Who is Solus Trust?

Solus Trust Company ("Solus Trust") is a federally chartered trust company regulated by the Office of the Superintendent of Financial Institutions ("OSFI"). We provide professional estate and trust services to individuals and their families such as Trustee, Power of Attorney and Executor services, all designed to meet the long-term needs of clients and the professionals we serve.

What services does Solus Trust offer?

Executor and Executor Support



- Can be appointed as executor in a will or can take on the full duties of an executor as agent
- Provide professional, thoughtful administration of estates and trusts of all levels of complexity
- Dedicated team of trust professionals deal with the settlement process from beginning to end
- Manage any potential risks and liabilities associated with being an executor

Appointment Under a Power of Attorney



- Undertake all aspects of financial administration in the event of loss of capacity
- Bring the professional skills and experience necessary to manage property and finances
- Ensure bills are paid, taxes are filed and investments are managed, alleviating these burdens from family
- Additional expertise in out-of-province assets, private corporations and real estate



Trustee and Trustee Support

- Serve as sole or joint trustee for a wide variety of trusts
- Bring not only technical and reporting experience but, more importantly, impartiality to the administration of trusts
- Provide support in an agency capacity to someone who is a trustee, lending expertise to the trust's administration

Simplify

Cash management service to alleviate burden from seniors and busy professionals

SIMPLIFY services are flexible and include:

- Bill payment support
- Income receipt processing
- Record keeping
- Important document review
- Assistance with tax preparation and filing coordination

Simplify.

Working together



- Access to specialist estate and trust planners
- Will storage for clients who appoint Solus Trust as executor
- Articles and resources
- Coordination and integration of other services (insurance services, charitable giving through Raymond James Canada Foundation, etc., as desired)



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