

# Solus Trust Company



## 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.
- Can be appointed by named executors to act as their agent to assist with the administration.
- Provide professional, thoughtful administration of estates and trusts of all levels of complexity.
- Supportive and dedicated team of trust professionals.
- Management of the 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



### Estate Trustee and Litigation Services

- As a corporate fiduciary, Solus Trust can become a valuable resource as a court-appointed trustee to objectively administer estates during litigation disputes.
- Impartial custody and management of assets pending resolution, administration where required.
- Coordination with legal counsel and interested parties.
- Continuity and stability through to final transition.

### Simplify

#### Simplify.

- Cash management service to alleviate burden from seniors and busy professionals.
- Bill payment support and Income receipt processing.
- Record keeping and statement provision.
- Assistance with tax preparation and filing coordination

### Working together



- Access to specialist estate and trust professionals.
- Independent with national footprint.
- Coordination with legal, accounting and investment professionals.
- Custodial options.

Whether acting as executor, trustee or power of attorney, our team of specialists have a wealth of experience to help navigate the complexities of estate and trust administration.

We take pride in fostering relationships based on responsiveness, trust, genuine care and empathy.

Our goal extends above and beyond safeguarding assets. We are committed to working closely with other professionals to preserve family harmony, ensure diligent care of beneficiaries, and safeguard meaningful, lasting legacies for generations to come.



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