About Us

Legacy Private Trust is a family owned and operated trust company with decades of experience both in the trust industry and working with aboriginal communities. As a trust company, we are federally licensed and regulated by the Office of the Superintendent of Financial Institutions. Our Aboriginal Trust Services represent a natural coming together of two things: our decades of experience working with trusts, and our team members' years of work with aboriginal communities. Our approach is focused primarily on highly personalized service. Our model has proven to be one which molds to our client's specific needs – not the other way around.

Next Steps

For more information on Aboriginal Trusts or about Legacy Private Trust, please contact us. We would be pleased to schedule a phone call or a meeting to discuss your situation and work with you to see how we can help.

LEGACY
PRIVATE TRUST

Contact Us

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Trusts • Estates • Agencies • Guardianships •
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Aboriginal Trust Services

Aboriginal Communities

Aboriginal Trust Services

Many aboriginal communities in Canada, after hard work and struggle, are facing new and challenging opportunities associated with sudden wealth as a result of settlements, economic development, and partnership with industry. It has become increasingly important for communities to reflect on how they can protect and grow these financial resources – not only for today – but for the benefit of many generations to come.

Utilizing a trust can help ensure that this wealth is used to create long-term self-sufficiency. Community members and corporate trustees working together can ensure that the governance of these trusts benefit from both community experience and professional expertise.

Our goal at Legacy Private Trust is to work with aboriginal communities in overseeing their trusts, either as a corporate trustee alongside community trustees, as an agent to assist community trustees or as a corporate trustee on our own. Our Aboriginal Trust Services offering is a coming together of our team members' experience working with aboriginal communities and our trust expertise.

How We Help

Protect Intergenerational Wealth

Protect community wealth to generate long-term community prosperity and self-sufficiency for many generations to come. Ensure strong governance with the help of an independent trust services provider.

Independence and Collaboration

Legacy is uniquely independent. We work with many other professionals, including the top trust lawyers, tax lawyers, financial advisors, consultants, investment managers, and custodians.

Continuity and Governance

Our owners are our senior executives, who have a vested interest in our clients' success and our business for the long-term. Regulated federally and provincially, clients are assured we have the robust governance and stability of any financial institution. Legacy Private Trust is also a CDIC member.

Capacity Building

We provide financial, trust and investment orientation and ongoing education to community members, community trustees, leadership and key stakeholders.

Experience

Work with a trust company with decades of experience both in the trust industry and working with aboriginal communities. Our diverse in-house team is comprised of Trust and Tax Lawyers, Chartered Financial Analysts, Compliance Officers, Accountants, and Certified Trust and Estate Practitioners.

Service

We are able to deliver superior service thanks to Legacy's untouchable service model. Legacy's client service staff has the lowest account load in the trust services industry, enabling each client the time and attention it requires and deserves from our professionals.

Transparency and Accountability

Our fully transparent fees are competitive with industry standards. Clear, direct accountability and a legal duty of good faith is ensured through a professional and regulated trust services relationship. This ensures that decisions are made in the best long-term interest of the community member beneficiaries.

Reporting

Our reporting includes attending community meetings, comprehensive Annual Reports, producing budgets, financial statements, trust accounts, and content for websites and newsletters.