



LEGACY
PRIVATE TRUST



Preneed Trusts

Funeral Home and Cemetery Services

Preneed Trusts

Funeral Homes and Cemeteries have found that their efforts to build their preneed business are stalled by their preneed deposit yields barely keeping up with inflation. One common reason is they have been limited to investing in low yielding investments for far too long.

We don't think that's good enough and know that many provinces' legislation allows the preneed area to be a profitable revenue source by utilizing low-risk investments with a higher yield. As a result of conversations over the years with friends, colleagues and clients in the bereavement sector, we developed an exciting and unique service offering for both Funeral Homes and Cemeteries. Preneed Trusts by Legacy Private Trust allow for low-risk, higher yielding investments to help make your preneed programs more profitable.



About Preneed Trusts at Legacy Private Trust

- Empower you to increase contract values and make your preneed program profitable
- Achieve higher yields that exceed the rate of inflation through low-risk, conservative investing and asset diversification. Preneed trusts should not be limited to low-yielding investments
- Allowed under provincial legislation
- Monthly or quarterly reporting available as well as deposits and withdrawals by cheque or electronic bank transfer
- 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
- Full transition implemented by our team of professionals in cooperation with provincial regulators
- Superior service thanks to Legacy's untouchable service model made possible by 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



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 Preneed 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 Funeral Home or Cemetery's situation and work with you to see if we can help.



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Contact Us

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

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