



Estates and Trusts

Concentra Trust specializes in planning and administering estates and trusts, regardless of value or complexity including those with farms and businesses, out-of-province beneficiaries, or difficult family dynamics. The experts at Concentra Trust will ensure commitments and wishes are accurately fulfilled while maintaining sensitivity to needs and concerns of all parties.

- Act as a corporate executor
- Act as an attorney or property guardian
- Perform trustee and trust administration duties

A flagship program, Executor EASE is a unique, flexible service designed to help executors understand and navigate their obligations and responsibilities. Executors can choose from a range of services and select only the options they require.

Corporate Trusts

Corporate trust solutions include cemetery and funeral trusts, corporate issuances, custodianship, escrows, resource trusts, and fully funded Retirement Compensation Arrangements.

A Trusted Partner

A national trust company, Concentra Trust provides tailored solutions designed to preserve and transition wealth to future generations. Working with a team of experts, clients can expect personalized service, impartial guidance and peace of mind for all their trust needs, including estate administration and planning, trusts, and registered plans.

- Assets Under Administration: \$27.1 Billion
- Executor/Trustee Appointments: 21,500+
- Over 60 employees dedicated to delivering trust solutions

Concentra Trust is a wholly-owned subsidiary of Concentra Bank.

Registered Plans

Registered plans make it easy for Canadians to save for long-term goals and retirement. Concentra offers a range of registered plan programs to organizations backed by a team of experts that support the administration and delivery of these products to your clients.

The strength of Concentra comes from deep roots in the co-operative system, built on shared values to grow and serve communities across Canada.