

Private Trust

Helping you plan to pass on your wealth through understanding the value of an up-to-date Will, including naming an Executor and a Trustee (if needed) and Powers of Attorney.

Will Planning Services:

Preparation of your estate for your loved ones.

Give your family the peace of mind an up-to-date Will can provide. Our Will Planning service helps you prepare your estate for the next generation, including:

- Will review to help ensure your current wishes are reflected
 - Ongoing assessments to discuss potential changes and strategies
 - Discuss a clear direction for passing on your wealth
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Power of Attorney Services:

Support for those who are unable to manage their financial affairs.

The incapacitation of a loved one can be devastating for both the individual and their families.

Our team of experienced professionals can assist with the management of day-to-day financial affairs.

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Executor Services:

End-to-end estate settlement services.

When it comes time to settle an estate, our Estate and Trust Services team provides experienced support.

Our full-service approach simplifies a complex process for your family, allowing qualified specialists/professionals to handle the many intricacies of settling your estate.

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Trustee Services:

Trust administration including protection, management and distribution of trust assets.

Assets held within a trust can require expert protection, management and distribution to beneficiaries.

TD Wealth Private Trust has the ability to administer the complexities of trusts to help ensure that your wishes will be followed. As an independent third party, the financial affairs of the trust will be effectively managed within the parameters of the trust structure that you have established.

