Announcing our Exclusive Partnership with Fiduciary Trust Canada

Fiduciary Trust Canada

Peter Dobrich, President

Private Trust Services

Private Financial Group has spent the past six months conducting research for an important addition to their services. They felt this service was a critical instrument to help clients navigate their assets. They wanted a partner that could offer them an exclusive agreement that would provide Estate and Trustee Services for existing and potential new clients. They also wanted to provide this service to the Windsor and Essex County region.

All of these goals were achieved and they made their choice: Fiduciary Trust Canada. In partnering with Fiduciary Trust Canada, PFG will be the exclusive advisor for anyone in this region looking to utilize their estate and trust services. Fiduciary Trust Canada is a subsidiary of Franklin Templeton. They currently manage just under 1 Trillion dollars in over 150 countries. FTC has many unique qualities that PFG feels will allow them to take a lead role in Estate Trust Services. These include:

- Flexibility in asset ownership
- Permanence
- Extremely attractive fees
- Impartiality
- Expertise
- Trustworthiness
- Local contact

We understand that you may have a lot on your mind. Whether you are in the accumulating, enjoying, or transfer phase of wealth management FTC and PFG can help you alleviate stress and organize your intergenerational plan.

Fees only occur once the estate and/or trust is being managed, and they are significantly less than competitors. Until then, the map is created for you alleviating the burden for any family members who may or may not want to be involved in the distribution.

FTC can be the sole, co-, or alternate executor and/or trustee in any given situation as well as Corporate Executor. As stated above, they are working with PFG exclusively to have a local presence while recommending that you utilize your existing legal and accounting team to help PFG plan for your family's legacy needs.

Whatever the need is and wherever, there is no reason to put it off. We are not restricted to Canada. We can handle assets in the USA as well.

PFG urges anyone looking into estate and trust services to consider their new partnership. At PFG, we are an advice-driven organization that is based on thorough analysis and have no issue offering this to someone who is simply curious.

Permanence creates comfort knowing that someone will always be there to distribute the estate. Delaying these decisions can be catastrophic; they can also be stressful and a potential government liability to the executors.

Ultimately, more often than not, court battles, arguments, broken family bonds etc. are the norm. A well-drafted legacy plan is the single most rewarding exercise that you can go through for your family. We will ensure that this is done in a cost-effective and professional manner. Our biggest investment is the first meeting; that is where we find out what is on your mind.

Private Financial Group is an advice-driven firm offering financial planning services in Windsor and Toronto. They have provided their clients direction and strategy for over 20 years based on client goals and intergenerational planning needs. PFG is currently focused on providing added value through Private Relationships. This includes Banking, Capital Markets, Estate and Trust Services, Insurance, and Wealth Management. www.privategroup.cc

What's on your mind? Isn't it time we talked.....

PRIVATE FINANCIAL GROUP

Quietly managing wealth.

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