

Agent for Trustee: a service that can help

Have you been appointed as a Trustee?

Serving as a Trustee is a significant responsibility that requires time and expertise to fulfill. Acting as a Trustee often demands a thorough knowledge of income taxes, business administration, accounting, real estate, and investments. It may also be a long-term commitment if the trust is to continue for future generations. This can be challenging if you live far away or already have a heavy work load.

We can help

If you have been named Trustee and find the responsibility too onerous or time consuming, BMO Trust Company can help you fulfill your duties.

We work closely with you, the beneficiaries, and legal and tax advisors to help ensure that assets pass from the trust to the beneficiaries in a smooth, orderly manner.

We can help provide you and the beneficiaries with peace of mind, continuity and professional trust management. Other benefits of our Agent for Trustee services include the following:

- management of the trust investments
- administration of the trust according to its terms
- management of closely held businesses
- filing of trust tax returns
- overseeing real estate assets
- acting as a trusted family advisor
- bill payment if and when necessary

How can BMO Trust Company help?

We can work with you in managing all aspects of the trust – investments, taxes, distributions – with care and discretion. We help ensure that trusts are administered prudently, efficiently, impartially and with the highest level of confidentiality. In fact, it's very common for us to advise multiple generations of a family. As a neutral third party, we can handle delicate family issues so that conflict is reduced or avoided.

If you would like to discuss how BMO Trust Company can help you perform your trustee's duties, call to arrange a meeting with us today at **1-800-844-6442**.