

“Generate a regular revenue stream while offering clients a competitive and customized service.”

A competitive and customized offering for your clients

It is projected that by 2018, there will be \$574 billion of wealth transferred by Canadians aged 65 and older.¹ This wealth transfer can be an opportunity for your business if you take the right steps.

When you establish yourself as the trusted advisor to your clients, there are challenges to attracting, servicing and retaining high net-worth individuals who are looking for a single financial quarterback:

- Providing your clients with the entire spectrum of wealth management services.
- Offering them personalized and dedicated service unique to their needs.
- Increasing the number of affluent clients that your business attracts.
- Protect and enhance your client relationships by elevating your service offering.

Strengthen your client relationships

Your client relationships are crucial to your business and you want to choose partners that will work with you to meet your high net-worth clients' unique needs. You maintain continuity in your role as trusted advisor when you play an active role on a strong team of professionals, including:

- Provide independent advice to clients and their families, on any financial planning issues.
- Schedule regular review meetings with clients and Fiduciary Trust Canada to update financial plans, retirement plans, succession plans, estate plans and insurance needs.
- Establish the ability to offer Trust and Estate services—an area of expertise expected by affluent clients.
- Receive all client statements and communicate regularly with Fiduciary Trust Canada pertaining client accounts.
- Quarterback the exchange of important information or discussion amongst clients and other key advisors, for example, Investment Managers, Accountants, Lawyers, other personal and professional advisors, and family members.

1. Investor Economics, HBS Report 2010.

Offer solutions that benefit your clients

Investment management

An integral first step in protecting and growing wealth is choosing the most appropriate investment solutions for your clients. One of the most sought-after options for high net-worth clients is separately managed accounts or discretionary account management, which provides a separate portfolio of securities—managed on a discretionary basis to meet each client’s specific objectives. Clients value a personal relationship with their own portfolio manager and expect their portfolio to be customized, not off-the-shelf.

“Responsible stewardship of wealth involves the effective transfer of wealth in keeping with a clients goals.”

As part of the Franklin Templeton group of companies, Fiduciary Trust Canada has direct access to the worldwide investment expertise and risk management platform of Franklin Templeton. These global resources enable Fiduciary Trust Canada to design fully diversified portfolios that consider global economic trends and to allocate among asset classes, geography and investment styles to meet the unique needs of each client.

Wealth transfer

Responsible stewardship of wealth involves more than managing investments. It also involves planning for the effective transfer of wealth in keeping with a client’s values and goals.

Fiduciary Trust Canada offers experience in administering all types of estates and trusts that provide for the seamless transfer of a client’s wealth:

Will and estate planning—We partner with you and your clients’ independent legal counsel to help develop an integrated and thorough estate plan. We can either work in concert with clients’ existing legal teams, or refer advisors and their clients to a network of professionals with whom we have working relationships.

Executor services—We settle estates efficiently to minimize taxes, resolve administrative problems, and provide prompt and appropriate distributions of assets to beneficiaries of the estate.

Trustee services—We faithfully administer any trusts, including trusts created while alive and those arising from a will, to protect the best interest of client beneficiaries.

When your clients appoint Fiduciary Trust Canada as their executor or trustee, they can also appoint you to provide investment advice for the trusts arising from their estate. In some situations, this can result in you retaining assets and cementing relationships with the next generation.

“In the next 25 years the number of affluent Canadians over the age of 65 will double.”²

Personalized and dedicated service

Fiduciary Trust Canada can address the critical challenge of attracting, servicing and retaining high net-worth clients by helping you provide them with personalized and dedicated service unique to their needs.

Personalized

Our team of senior executives is well versed in working with advisors and their clients to integrate financial, asset management and estate plans in a streamlined manner. Our performance is judged by how well we preserve and grow capital and how we address client concerns or solve problems.

Dedicated

At Fiduciary Trust Canada, a dedicated professional team provides one-to-one service. Each client will work with their own Portfolio Manager and Private Client Service Associate, who will be trusted partners in a long-term relationship that always places clients' needs first while respecting your ownership of the client relationship.

Seize the opportunity to build your business

Our integrated investment management, trust and estate administration services can help maximize the value of your book:

Hold on to existing assets—Take charge of the money-in-motion cycle by offering a service that covers clients from wealth accumulation, to wealth transfer, and on to wealth accumulation for the next generation.

Access new assets—Increase your share of client assets by partnering with us to provide a comprehensive wealth management solution to affluent investors.

Acquire new clients—Increase your chances of referrals as you expand your service offering for high net-worth clients.

Deepen your client relationships

Strengthen your client relationships and increase the number of touch points with clients by coordinating the exchange of important information or discussion between your clients and other key advisors, such as Portfolio Managers, Accountants, Lawyers, personal and corporate centres of influence, and other family members.

2. Statistics Canada, 2008.

FIDUCIARY TRUST COMPANY OF CANADA and its predecessors have specialized in investment management for individuals and families since 1982. A federal trust company license enables Fiduciary Trust Canada to act as executor and trustee, thereby allowing it to provide continuity of wealth management through multiple generations. As part of the Franklin Templeton group of companies, Fiduciary Trust Canada has direct access to the worldwide investment expertise of Franklin Templeton.

These global resources enable Fiduciary Trust Canada to design wealth management solutions that are unique to each client. Fiduciary Trust Canada offers the following services in Canada:

Investment Management | Investment Funds* | Estate Administration | Trust Administration



Fiduciary Trust
Canada



**FRANKLIN
TEMPLETON**

fiduciarytrust.ca

Calgary

335 Eighth Avenue SW, Suite 1940
Calgary, Alberta, Canada T2P 1C9
(800) 574-3822

Toronto

200 King Street West, Suite 1500
Toronto, Ontario, Canada M5H 3T4
(800) 574-3822

Montreal

1002 Sherbrooke Street West, Suite 1940
Montreal, Quebec, Canada H3A 3L6
(800) 574-3822

Fiduciary Trust Canada is a business name used by Fiduciary Trust Company of Canada.

Fiduciary Trust Company of Canada is an indirect wholly owned subsidiary of Franklin Resources Inc., a global investment organization operating as Franklin Templeton.

*Investment funds are offered through Fiduciary Trust Company of Canada's wholly owned subsidiary FTC Investor Services Inc.