



Trust & Estate Services

Professional and personal services that support your ongoing independence and desired lifestyle, and fulfill your wishes for your estate



GENERATIONS WELL SERVED IN PERSONAL, COMMERCIAL & ESTATE LAW.



Why use Munro & Crawford Trust & Estate Services?

The senior years can bring a surprising amount of change, plus the **need for new services and extra support**. Everyone needs someone they can trust to act in their best interest in the little things, as well as the big things.

Trust is at the very heart of who we are and what we do. We have been looking after the legal affairs of our clients for decades, in the process building strong relationships and sharing many of life's major milestones. And over the years we have built up the capacity to offer support across a complete spectrum of needs for our seniors and their families - **from sophisticated legal advice to essential daily activities** like managing the household finances, organizing the yard work, or engaging companion services.

Munro & Crawford Trust & Estate Services provides **highly personalized Trust and Estate services for seniors** in four key areas:

- Financial Management
- Home Management
- Health & Companionship
- Legal Services

Set your own course - Each life stage has new needs

Munro & Crawford Trust & Estate Services offers a complete range of evolving services for your **personal and financial needs** as you age. Our experienced principals provide assistance to you and your family in meeting changing needs; and fulfilling your wishes for your estate. All clients are welcome in the Munro & Crawford Trust & Estate practice – **regardless of level of wealth or health**. There is no requirement to move investments or savings from where they are currently placed.

TRUSTEE SERVICES

Trustees are obligated to ensure the trust assets are protected, proper accounts are kept, and beneficiaries are looked after properly.

Trust & Estate Services include:

FINANCIAL MANAGEMENT

- Monthly Bill Payment
- Expense Management & Planning
- Trust Administration
- Tax Support
- Oversight of financial agent

HOME MANAGEMENT

- Yard Management
- Cleaning Services
- Preventative Maintenance
- Snow Removal
- Downsizing

HEALTH AND COMPANIONSHIP

- Care Giver/ Companionship
- Transportation Management
- Healthcare Advocacy

LEGAL SERVICES

- Estate Planning
- Trustee Services Estate
- Trustee Services Person
- Executor



POWER OF ATTORNEY

The purpose of establishing a Power of Attorney is to have a person authorized to manage your assets while you are alive. Munro & Crawford Trust & Estate Services **provides oversight to help people to age gracefully at home.** If a person becomes physically or mentally incapable of managing their assets we can act for them without the need for a Committee Order from the courts.

We can act as your Power of Attorney if you become incapable, or in the interests of minors, when suitable family members are not available.

SERVICES FOR ESTATE EXECUTORS OR ADMINISTRATORS

People often appoint their spouse, child, sibling or close family member to be their Executor, trusting these individuals to act in their best interests and ensure that their wishes are carried out. An executor is responsible for settling an estate according to the deceased's wishes. It is not an easy job - especially while grieving.

Munro & Crawford Trust & Estate services can act as:

SOLE EXECUTOR - Named alone in your will to act independently to carry out your wishes;

CO-EXECUTOR - Acting in concert with the person you feel has the insight and personal understanding of your situation; or

ALTERNATIVE EXECUTOR - Able to step in should your initial executor be unwilling or unable to fulfill his or her responsibilities

How will I know what I need?

STEP 1

UNDERSTANDING YOUR NEEDS

A Personal meeting is the best way to understand how we can meet your current and future needs. Please contact our offices today for a **confidential interview** with a Munro & Crawford Trust & Estate Services principal. Your meeting can be arranged at our offices at **5670 Yew Street** or at your home.

Call **604.266.7174**

Or email us at **info@munrocrawford.ca** and schedule your appointment today.

STEP 2

A PERSONALIZED PLAN IN RESPECT OF YOUR WISHES

Munro & Crawford Trust & Estate Services will prepare a **personalized Trust & Estate Plan** reflecting what was discussed during your Step 1 meeting. Your principal will take you step by step through the recommendations and options. You can take as much time as you need to ask any questions and understand the rationale for each of the recommendations. Any final additions or corrections to your Trust & Estate Plan will be made at this time.

STEP 3

PUTTING YOUR PLAN IN MOTION

With your personalized Trust & Estate Plan in place, Munro & Crawford Trust & Estate principals will **ensure the smooth and timely execution of each aspect of the plan**. And don't worry if your circumstances change – **we will be with you every step of the way to adjust and accommodate your changing needs and wishes**.

Meet the Principals

PETER CRAWFORD

Peter has been a legal advisor in the area of Estate Planning and Administration for more than 30 years. He has a long history of successfully guiding trustees and personal representatives through complex estate administration.

JONATHAN MACKENZIE

Jonathan is a property management consultant to Munro & Crawford Trust & Estate Services and provides a complete range of home and personal property management services, including downsizing, transition, and estate wind-up.

KATARINA TAGLIAFERO

Katarina specializes in estate and trust management. Her services extend from the direction of day to day financial needs and health and companionship requirements, to estate wind-up from probate through to asset distribution.

KEN FRIESEN

Ken is a consulting lawyer to Munro & Crawford Trust & Estate Services and has been a litigation attorney for 20 years. He provides advice to executors, trustees, committees, and beneficiaries; helping people meet their duties and responsibilities, and represents them in legal conflicts.

*"Aging is not lost youth,
but a new stage of
opportunity and strength"*



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