



COASTAL COMMUNITY
CREDIT UNION

TOGETHER, LET'S DO GREAT THINGS

Concentra. The name to trust.

Concentra Trust is a national trust company specializing in estate and trust solutions for over 60 years.

We offer personalized service, impartial guidance and tailored solutions for executors administering estates, regardless of value or complexity. This includes estates involving farms and businesses, out-of-province beneficiaries or difficult family dynamics.

The strength of Concentra lies in our deep roots in the co-operative system, built on shared values to grow and serve communities across Canada.

Estate & Trust Specialist

250.713.0172

estatespecialist@concentra.ca

Coastal Community experts

888.741.1010

service@cccu.ca

At Coastal Community Credit Union, we're passionate about building stronger relationships to improve financial health and enrich people's lives – through all life stages and events.

Coastal Community Credit Union strives to meet the unique needs of our members and clients through forward thinking financial solutions, such as our collaboration with Concentra Trust. We understand that being an executor is difficult. The role comes with complex duties that can become burdensome during a time of grief. If you're an executor looking for professional guidance to help you navigate through these responsibilities, please consider Executor EASE. This unique program is made possible through Coastal Community's partnership with Concentra Trust.

Call our local Trust Specialist at 250.713.0172 to see how we can help.

Coastal Community is the largest financial services organization based on Vancouver Island and the Gulf Islands. Learn more at cccu.ca or connect with us on Facebook and Twitter.

*Insurance services provided through Coastal Community Insurance Services (2007) Ltd. †Financial planning and investment services provided through Coastal Community Private Wealth Group, a division of Coastal Community Financial Management Inc.

Concentra®

TRUST

Executor EASE

Tailored Solutions for Executors



In collaboration with



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Our team of trust specialists works with estates of all sizes and complexity and can be brought in at any time during the estate administration.

Administering an estate can be a difficult task, and being an executor for the first time can make it even more challenging. We offer professional help to guide you through the duties, responsibilities and administrative requirements that come with the role.

Executor EASE is our innovative service designed to help executors successfully fulfill their obligations and responsibilities in a thoughtful, caring and timely manner.

Executor EASE is the solution.

Executor EASE is a flexible, affordable solution that allows you to choose as much assistance as you need. It begins with a no-cost, no-obligation consultation with a trust specialist. During the consultation, our specialists work with you one-on-one to better understand the complexities and needs of the estate then offer appropriate solutions tailored to those specific needs.

You select only those services you require, and nothing more. This is the case whether you need help preparing the probate application, or need more comprehensive assistance with all of your executor duties.

What is probate?

Probate is the legal process to validate a will and formally confirm the appointment of the executor. It is the first step in the legal process of administering the estate.

Remember, with Executor EASE you select only those services you require. The estate pays for the services, and nothing more.

Contact us for a no-cost, no-obligation consultation.

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