

[Banwell Financial \(BFI\) works in partnership with Fiduciary Trust Company of Canada \(FT\)](#) for clients who need the services of a Corporate Trustee or a Corporate Executor in administering and managing an estate.

The Fiduciary Trust Investment, Trust, and Estate Program (ITE Program) is another example of BFI offering best in class, institutional grade services to our clients.

FT is part of Franklin Templeton Investments one of the largest publicly traded investment managers in the world.

Our partnership is totally respectful and works in collaboration with your existing professional advisors (legal/accounting) as part of a comprehensive wealth and estate planning strategy.

Discretionary Portfolio Management if required is available directly from FT on a referral basis as one component of the ITE Program.

It is not uncommon for some of the larger institutions in Canada to be charging upwards of 4-5% plus additional transaction costs for Corporate Trustee and Estate administration. This expensive offering normally comes with a 1-800 number and an inconsistent level of service and staff turnover.

In contrast our collaborative partnership offers a level of personalized service that is consistent, trustworthy, totally transparent and is unmatched by the big banks in Canada.

There's a very human side to our business and we focus on this aspect in a professional manner. Our combined expertise and experience is how we make a real difference to families.

Elaine V. Wilson, M.Sc.,L.L.B.,TEP
Vice President, Personal Trust Services
Fiduciary Trust Canada

Our fees are transparent and normally offer clients considerable savings. A net worth greater than \$1 million (including principal residence) or existing assets with Franklin Templeton Investments of \$250,000 are needed to qualify for the ITE Program.