



Since 1916, CIBC Trust and its predecessors have been meeting the estate and trust needs of Canadians with expertise in estate and trust administration, property management, investment management and tax filing.

CIBC TRUST OFFER

CIBC Trust offers a wide range of estate and trust solutions with a variety of benefits, including:

Agent for Executor: While being named executor of another person's will can be a great honour, it is also a major responsibility. As an executor, you are responsible for communicating with all estate beneficiaries, applying to have the will probated (if required) and administering the estate according to the provisions laid out in the will. The record keeping requirements are significant and you may be held financially liable if there are any errors made in the administration of the estate. As your agent for executor, CIBC Trust can help you navigate this complicated process to help you fulfill your executor duties by managing the day-to-day administration of the estate while you maintain control of all decisions.

Agent for Trustee: The role of trustee is complex. Managing and administering a trust can be a lengthy and time consuming process that could continue for many years. Balancing your personal commitments with your responsibilities as trustee can be challenging, but CIBC Trust can help you fulfill your trustee duties, minimize risk and provide support along the way. As agent for trustee, CIBC Trust can manage the day-to-day administration of the trust, consulting with you every step of the way. For complex trust administration issues, we can draw on the expertise of our CIBC partners, and can act as an objective third-party to help you manage family and beneficiary conflicts.

Agent for Attorney: When you are named power of attorney (POA) for personal property, you are asked to take on a wide range of complex responsibilities that may require a commitment of many years. Managing another person's financial affairs and taking on responsibility for their financial well-being and that of their family can be daunting. CIBC Trust can act as agent for attorney providing you with ongoing and proactive support through our team of specialists who have expertise in investing, banking and tax, and who can help you make objective and educated decisions.

Corporate Executor, Trustee and Power of Attorney: If you are not able to select a suitable executor or trustee, you may wish to appoint CIBC Trust as your executor or co-executor of your estate, or as trustee or co-trustee for your personal trust. When you name CIBC Trust as corporate executor or corporate trustee, you will have peace of mind knowing your named beneficiaries will benefit from the experience and expertise of our team of specialists.

CIBC Trust can also be appointed as your power of attorney. In doing so, CIBC Trust will professionally manage your financial affairs in the event that you are not able to do so.

WITH CIBC TRUST, YOU CAN BE CONFIDENT THAT OUR EXPERIENCED TEAM IS COMMITTED TO MEETING YOUR ESTATE AND TRUST NEEDS WITH CARE, SENSITIVITY AND EXPERTISE.