Your Estate Planning Session with Mennonite Trust

Your Estate plan is an expression of your care for loved ones and for causes you are passionate about. The best plans are legally sound, adequate for the present and dynamic enough for future needs. At Mennonite Trust, we have the experience and expertise to create such a plan with you.

How shall I prepare?

We value your cooperation so we can gather relevant information to your situation. Your attention to the Personal Affairs record will be very helpful to us. Statements of asset values, and details about titles and accounts will allow us to factor in tax and legislation matters. More information means we can help you plan better.

Thinking ahead about causes which are important to you will also be helpful. You may want to think about overall percentages of your estate to allocate to various areas.

Since the right Executor is so critical to effective management, your Estate Planning professional will offer principles which point to the best choice for Executor. Your Power of Attorney will also be a critical choice to consider.

THE BEST EXECUTORS:

- Have plenty of TIME to offer
- Are able to be completely IMPARTIAL, and fully trusted by all beneficiaries
- Have a proven set of SKILLS related to Estate Management – taxes, titles, legislative requirements, etc.

Consider Mennonite Trust!

Personal, Professional,
Purposeful Estate Services
for the People of Saskatchewan

What will be discussed?

We will focus on things you need to know, like how to avoid unnecessary costs at death, or how to set up trusts for those who need them, or how to plan for after-death tax costs or probate.

We will also ensure that you have a Power of Attorney in place to meet needs if you are rendered incapable. We also make available a Living Will, or Healthcare Directive, to allow you to direct your healthcare providers as to your wishes.

Are Mennonite Trust Staff qualified?

Mennonite Trust has been helping with Estates, Wills and planning in Saskatchewan since 1917. Our Estate planning professionals are fully versed in applicable Saskatchewan legislation and MTL has administered thousands of estates.

We ensure that each of our Planners has a Certified Financial Planner (CFP) designation or is on the way. With a broad range of knowledge in investments, real estate, insurance, taxes, budgeting, and succession planning – be assured that you are in good hands.

What will this cost?

As a non-profit corporation, we provide highly cost-effective professional planning for Estates and Wills. Is this your first estate plan with MTL? One hour of planning is only **$150** for a couple or **$100** for a single person. In more complex situations exceeding an hour of planning, a surcharge may apply. If you already have a Will with us, planning reviews and revisions are billed at **$220** per hour or portion thereof. Commonly, the plan results in a need for Will or Power of Attorney documents, which we prepare for you at no cost.

If you complete your signing of your Will at any of our offices, we provide, staff as witnesses, with Affidavits. All our clients receive complimentary lifetime, secure safekeeping for Will and Power of Attorney documents.

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