

CanTrust Wealth Preservation Accounts

What you could expect during the life of this investment

Your trust investment could be in place for many years and the trust itself could last for up to 125 years.

We have set out below some housekeeping points and outlined the things that could happen in future. If any of these are not clear, please ask your professional adviser about them.

Housekeeping

- Make sure that your initial trust has been dated at the top of page 2
- This date should be the same as the Account commencement date
- Please keep your policy documents and the trust deeds in a safe place
- Let the other trustees know where these documents are, for future reference
- If you have not already done so, let the other settlement trustees know your intentions as to who should benefit from the trust and in what circumstances

Your investment

- Your investment is being managed by your fund adviser (see below)
- They will discuss your objectives with the trustees and decide on the appropriate investments to be held in the trust fund
- The trustees will receive a valuation each quarter

Ongoing management

- 60 days before each anniversary date, we will write to the trustees, asking if the settlement trustees want all or some of a maturity payment to be made or whether that year's maturity is to be deferred to another year
- A form will be enclosed for the trustees of the initial trust to advise us of the action to take – please complete and return one of these
- If we have not received the form by 30 days prior to the anniversary date, we will send out a reminder
- All of the initial trustees have to sign and date the maturity form that we send you – **we must receive the form at our administration office before the maturity date**
- If the trustees want to distribute any of the trust to your beneficiaries at any time, please contact your professional adviser as they will be able to tell you the best way to do this
- After your death, the remaining trustees will look after the investment and decide whether to keep it going or distribute the trust fund to your beneficiaries

My fund adviser

Name:
Address:
Tel:
Email:




Canada Life International Limited, registered in the Isle of Man no. 33178.
Registered office: Canada Life House, Isle of Man Business Park, Douglas, Isle of Man IM2 2QJ.
Telephone: +44 (0) 1624 820200 Fax: +44 (0) 1624 820201 www.canadalifeint.com
Member of the Association of International Life Offices.



Canada Life International Assurance (Ireland) DAC, registered in Ireland no. 440141.
Registered office: Irish Life Centre, Lower Abbey Street, Dublin 1, Ireland
Telephone: +44 (0) 1624 820200 Fax: +44 (0) 1624 820201 www.canadalifeinternational.ie
Member of the Association of International Life Offices.

Canada Life Limited, registered in England no. 973271. Registered office: Canada Life Place, Potters Bar, Hertfordshire EN6 5BA.
Telephone: 0345 6060708 Fax: 01707 646088 www.canadalife.co.uk Member of the Association of British Insurers.

Canada Life Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.
Canada Life International Limited and CLI Institutional Limited are Isle of Man registered companies authorised and regulated by the Isle of Man Financial Services Authority.
Canada Life International Assurance (Ireland) DAC is authorised and regulated by the Central Bank of Ireland.

 This paper is made from recycled materials

ID6580 – 418R