FAIRHEADS
Benefit Services

Place the **investment**, **protection** and **administration** of your legacy in the care of the

FAIRHEADS LEGACY TRUST

WHY THE LEGACY TRUST?

The protection and wellbeing of your heirs and dependants are important and you want the assurance that their affairs are managed with the appropriate care and expertise. Fairheads has a long and proud history of providing trusteeship to thousands of beneficiaries over many decades, and we understand our fiduciary duty to implement your wishes. Fairheads is an authorised financial services provider.

Fairheads offers:

- Experienced trusteeship
- Benefits of scale
- Strong governance
- Professional and expert management

WHO CAN BENEFIT FROM THE FAIRHEADS LEGACY TRUST?

The Trust has been designed as a cost-effective, professionally administered vehicle to safeguard assets on behalf of beneficiaries.

These include:

- Deceased Estates
- Inter Vivos Trusts (living trust)
- Testamentary bequeathment
- Road Accident Fund (RAF)
- Medical Malpractice payments
- Life Insurance payments
- Retirement Funds
- Private Trusts

ABOUT INVESTMENTS

- **Independent, best of breed investment managers** are appointed by the trustees, and their performance is monitored and reported on, on an ongoing basis to ensure that assets are managed appropriately.
- **Institutional investment fees** are negotiated on behalf of beneficiaries, ensuring that the benefits of scale are achieved.
- **An investment policy statement is** in place, reviewed regularly by the trustees and an independent asset consultant.
- **Investment allocations** can be tailored to meet individual needs, or our default allocation model can be used.

SUPERIOR ADMINISTRATION

- Our client centric approach ensures that members experience a service that is accessible and efficient. We offer a number of contact and service channels, including a state-of-the-art contact centre and face-to-face service at our regional client walk-in centres.
- Capital claims are assessed for affordability, taking into account the age and needs of the beneficiaries.
- Income distributions are carefully managed to contribute towards the general well-being expenses of the beneficiaries, whilst allowing for the preservation of the capital amount.
- Communication is key in our client service approach. Members receive standard reports and communication:
  - Annual member financial statements
  - Annual investment report
  - Annual tax information, where applicable
  - Annual member newsletter

  SMS and email are predominantly used, where possible, to convey information together with our Facebook page and the Fairheads website.
- **Access to trustee services** is available during the lifetime of the trust, from experienced trustees with legal and fiduciary qualifications.

FAIRHEADS
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Contact a Fairheads consultant to discuss how the Fairheads Legacy Trust can help you ensure the financial well-being of your loved ones.

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