FAIRHEADS
Benefit Services

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

THE FAIRHEADS LEGACY TRUST

The Fairheads Legacy Trust Reg. No. IT888/2017

WHO CAN BENEFIT?

Anyone interested in preserving their legacy on behalf of their loved ones can contact us. In addition, attorneys and others involved with trusts may welcome the opportunity to obtain professional trusteeship at a reasonable cost.

Here's why:

- The fiduciary, trusteeship, investments and governance aspects are all taken care of
- No need to register a trust deed
- Access to funds from day one
- No need to appoint trustees
- A simple process in place
- Transparency on costs
- Peace of mind that funds are safely invested with best of breed investment managers.

WHAT IS THE FAIRHEADS LEGACY TRUST?

The Trust is a cost-effective, professionally administered umbrella trust which has been designed to safeguard assets on behalf of beneficiaries.

The product is based on Fairheads' experience in trusteeship for over 90 years, as well as our superior administration as Southern Africa's leading independent benefits administrator.

The estate planning advantages of trusts are well known, but trusts have traditionally been beyond the reach of the man in the street. Where stand-alone trusts have been set up they are often unnecessarily expensive and a burden to administer.

The Fairheads Legacy Trust changes all that. At last there is a trust for the middle market.

The Fairheads Legacy Trust can accept assets from:

- Deceased estates
- Inter vivos trusts
- Testamentary bequests
- Road Accident Fund (RAF)
- Medical malpractice payments
- Life insurance payments
- Disability policies
- Retirement funds
- Private trusts
- Discretionary savings for education or any other purpose

WHY THE FAIRHEADS LEGACY TRUST?

- Our client-centric approach means that clients experience a service that is efficient and accessible, with a state-of-the art contact centre and regional walk-in centres.
- Trusteeship - access to trustee services is available from experienced trustees with legal and fiduciary qualifications.
- Communication – clients receive annual financial statements, an annual investment report, annual tax information if applicable and an annual newsletter.
- Benefits of scale – leading to reduced costs.
- Strong governance – we ensure that the benefits promised in terms of the rules are actually delivered; that the benefits are optimal with minimal risks; and that the process of delivery of these benefits is credible and worthy of the trust of the beneficiaries.
- Independent, best-of-breed investment managers – institutional investment fees are negotiated on behalf of beneficiaries, and an investment policy statement is in place. Investment allocations can be tailored to meet individual needs, or our default allocation model can be used.

POSSIBLE SCENARIOS

- You may become mentally incapacitated through an accident and your loved ones need swift access to liquid assets for their care. You can nominate The Fairheads Legacy Trust to accept benefits from a disability policy or the RAF.
- You want to provide for your minor children in your Will. Instead of a costly stand-alone testamentary trust or the Guardian’s Fund, you can nominate The Fairheads Legacy Trust to accept testamentary bequests.

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www.fairheads.com

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