

# Trusts

Build your future, family and business continuity by having a financial plan and setting up a trust for when you're no longer there



**If you've built up your business and have been taking care of your family financially, you need to have a financial plan to make sure that life (and business) goes on when you are no longer around.**

## Trusts

A trust can be established whilst you are alive, or upon your death, in terms of your will. When implemented appropriately, it can be a viable estate planning solution to preserving a legacy for current and future generations.

### Protect your family and business continuity by setting up a trust

A trust can be established for the following:

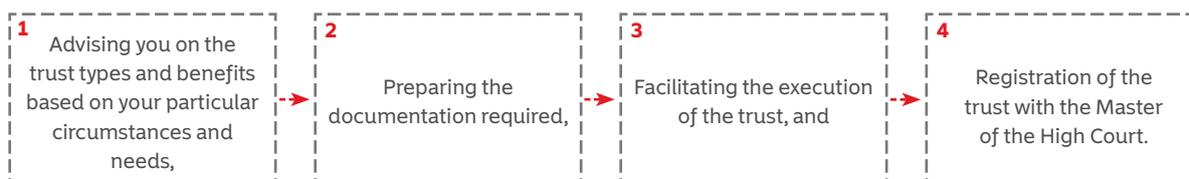
- Protection and preservation of your assets, such as property, artwork and other investments or business interests, for the current and next generation.
- Charitable purposes or other special causes.
- Minor beneficiaries, to hold:
  - cash and investments that can pay an income for schooling or university, or
  - assets, such as a house.
- Maintenance commitments in a divorce settlement.
- A disabled dependent or an aged parent who relies on you for financial support but cannot manage money or assets on their own.

### Setting up a trust and aligning it with your will

When a trust and will are aligned, you can be sure that your objectives and wishes will be met. Once a trust is established, it must be properly administered and the trustees must comply with their duties.

### Trust Momentum

The specialists at Momentum Trust can work with you and your financial adviser to guide you through the process of setting up a trust, which includes:



Momentum Trust is committed to offering service levels that are speedy and efficient, without compromising on quality; and by working together with your financial adviser, who is included on every step of the way, you can be sure that your solution is integrated with your financial planning process, and aligned to your needs.

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