



TRUST BUSTERS

Georgie's Weekly Myth Spoilers

For one time only, Georgie is going **live!**

November 4th, 2021

1:00-2:00 PM MST / 3:00-4:00 PM EST

Click below to save your seat!

[Click Here to Register](#)

Dear Georgie,

Our Corporate Trustee made all these promises of service but we're lucky to see them just to review the audit. We keep asking them for newsletters, training and participation in the communities annual general meeting to no avail. Please advise.

Sincerely,

Roaring Mad

Dear Roaring Mad,

I am sorry to hear that you are not receiving the service you expected. I would review the Trust under Duties and Powers of the Trustee/Authorized Investments and write down all the items of service they are required to provide. Then review their services agreement for value added service promises and write these down. Then I would contact them to review the Trust and their obligations. Try to come to some form of agreement that will ensure they are doing what is expected and what is value added. If there is no resolution, you can terminate and replace them as a very last option.

Sincerely,

Georgie

Dear Georgie,

Our Nation just received a settlement and our Council are trying to figure out if we should invest all of the money right away or in stages. What would you advise?

Sincerely,

Eager Ed

Dear Eager Ed,

It is always advisable to invest all of the money as soon as the Investment Policy has been approved. This makes it easier to ensure the money is being according to the rules of the Investment Policy. If your Community has other plans for the funds that may or may not materialize, then it makes sense to invest in tranches (or stages) because you want to have the funds on standby. Otherwise, it is advisable to invest the money right away.

Sincerely,

Georgie

Do you have a question for Georgie? Email Georgina.Villeneuve@peacehills.com to be featured in an upcoming Trust Busters!