

The Partner News

BC Partners In Planning's Client Newsletter



Last month we launched our in-house trust company, BCPiP Trust Company Ltd. (keep your eyes peeled - a new and exciting name is in the works!). Setting up this company was a goal that Marian had for many years and it's come to fruition at long last. There are a number of reasons why appointing a trust company to be an Executor or Trustee in your Will or Trust is a good idea, such as:

- You do not wish to burden a family member or friend with time-consuming estate or trust responsibilities
- You do not have a family member or friend with the professional skills or experience for estate or trust administration
- You do not have a family member or friend who lives in B.C. and is willing and experienced to take on estate or trust responsibilities
- You want to ensure equity, harmony, and minimal disputes between your beneficiaries
- The individual you have personally appointed as an Executor or Trustee needs assistance in carrying out their responsibilities
- You have a complicated estate involving an operating business or other share ownerships that would benefit from the knowledge of an expert
- You wish to preserve your family legacy and aren't sure how to do this without professional advice

Even if you still wish for a family member or friend to remain as your Executor or Trustee, we can offer our services as an Agent, by providing guidance, support, and administrative services to them as needed. The services we now offer through our trust company are:

- **Executor:** We would distribute your estate as outlined in your Will to your beneficiaries
- **Trustee:** We would maintain an ongoing Trust with distributions to your beneficiaries
- **Financial Power of Attorney:** We would manage financial affairs on your behalf during times of incapacity
- **Agent:** We would provide guidance and support as needed to the individual you have appointed as Executor/Trustee/Power of Attorney



Who's Behind the Books?

Trish Hunt - Administrator



In this issue of The Partner News, we interviewed one of our administrators Trish. She has worked at BCPiP for a number of years and has jumped between different roles during her time here. We were able to get the scoop on her life at BCPiP.

BCPiP: Tell us a little bit about yourself.

Trish: I grew up here in West Van and have lived here for my entire life. I went to Capilano University for general and legal secretarial studies. After graduating, I started my legal career in general practice as a legal secretary for about seven years and then did family law for another seven years. During that time I had some kids so I decided to find a job that gave me a flexible schedule. So, I worked at an immigration and corporate law office that allowed me to work from home during the evenings. This was before “real technology” so I was given piles of files each week to do and then courier back to the office when they were completed. My legal secretarial/assistant career spanned about 20 years and during that time I worked in a couple of other jobs. I worked for the West Van school district as an on-call teaching assistant, worked in our family insurance business doing some bookkeeping and eventually made my way to BCPiP when Marian asked me to join the team. I started off getting hired to help manage Marian in her day-to-day stuff but that grew into doing some bookkeeping and other administrative jobs.

BCPiP: Did you enjoy your time working in the legal world?

Trish: My legal career was very interesting. During my seven years in family law, I was able to do some private adoption work where I was actually able to help “deliver” the babies! Not real deliveries, but I helped facilitate the delivery of the babies from the birth mothers to the adopting families. That was a very rewarding part of the job. Also, I worked in the

areas of separation and divorce. This proved to be quite stressful. There were times when I needed to de-escalate situations that made the work really challenging.

BCPiP: Interesting, and what do you do now at BCPiP?

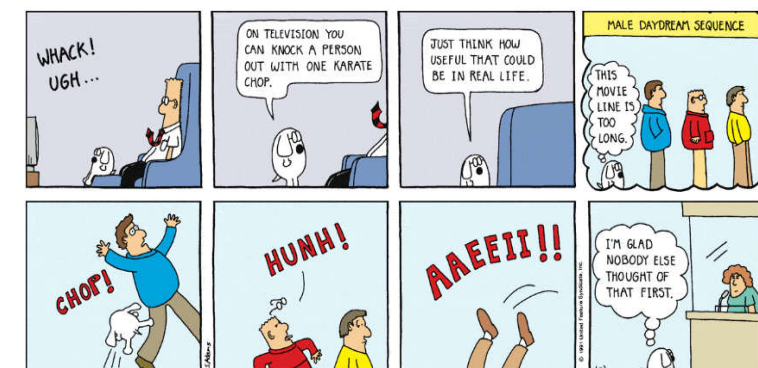
Trish: I work in an administrative role in the office and also help out with our clients' bookkeeping. One of my new new-found jobs is preparing our client's T2 packages. I find that throughout my time here at BCPiP, I continue to be challenged with new work that brings large learning curves. However, I have enjoyed the learning process of it all and being a part of different areas of this business.

BCPiP: What do you like to do in your free time?

Trish: When I am not at work, I enjoy cooking and making new recipes for my family. I enjoy going on walks everyday and twice a week I train in karate and kobudo. I was a late boomer to karate as I got into it while watching my youngest son do it as a kid. I thought that since I am just sitting here watching, I might as well try it out myself. I have been doing it ever since with days that are better than others. However, I feel that the enjoyment I get from training outweighs those down days. Even though these may seem like intimidating sports to be in, I have found martial arts to be a lot of mind over body. Sometimes the mind and body are not always in sync so being a part of this has been really beneficial. A saying that I learned in karate and fall back on a lot is “seek perfection of character”. This means that you are always working to improve so it is a life long mission to keep striving to be better, be patient, and learn things along the way.

BCPiP: Do you have any plans for the future?

Trish: I am not too sure how the future looks. However, I am hopeful that it is full of new opportunities, new goal and new challenges!



Lawyer Profile

**Sandra McLean - BCPIP Trust Company Ltd.
Chief Risk Officer, B.A., LLB**

As a key member in establishing the BCPIP Trust Company Ltd., Sandra has had years of experience in both a trust and corporate setting. After getting the trust approved for operations, we seized the opportunity to get some insight on the newest company joining the BCPIP family.



BCPIP: Congratulations on getting the trust approved!

Sandra: Thank you. We are all excited to finally have the trust be fully operational.

BCPIP: Tell us a little about your background.

Sandra: I grew up here in West Vancouver and have lived here for my entire life. I went to UBC to do my bachelors in psychology because I wanted to be able to help people. I realized from all the experiences in my undergrad that I wanted a career that involved problem solving, critical thinking and helping people. Also, I knew early on that I wanted to become a lawyer so right after I finished my degree I wrote my LSAT. Luckily, I was admitted to law school at UBC which is where I completed my law degree.

BCPIP: What did you do before coming to BCPIP and how did you get your start here?

Sandra: I started my legal career articling at a large law firm in Vancouver. It was an amazing experience with lots of long hours. I moved around the company working in the corporate, commercial, real estate, and wills & estates departments. After about 5 years of working there, I joined HSBC as an in-house legal counsel. I started off in compliance but spent most of my time helping them start a trust company. I worked there for about 25 years until I decided to work at another trust company in a similar role. Somewhere along the way I met Marian when our kids were in school together and we would often go on hikes with our dogs. She would

talk to me about the possibility of a trust company at BCPIP. She believed it could be an important addition to BCPIP that would be incredibly beneficial for our clients' estate plans. We kept in-touch over the years and one day she asked if I could help start BCPIP Trust Company. She truly saw that adding this trust would help BCPIP provide full circle services to our clients and saw the growing need for these services as the population ages. Of course I said yes and that is how I got my start here.

BCPIP: Wow that was very proactive of her. What was your role during this process and what will it be moving forward?

Sandra: I have and will continue to be the Chief Risk Officer of the trust going forward. Prior to our approval, I organized and prepared our application to the regulatory body that governs BC trusts companies, BCFSA. Moving forward, I will deal with the governance of the trust which entails meeting regulatory requirements, following regulatory guidelines, liaising with the BCFSA, assisting in the preparation of board documents, preparing policies and procedures for the company and assessing risk for the entire trust company. This means looking at every area of risk from operations to business continuity to I.T..

BCPIP: What do you like to do outside of work?

Sandra: I love to take my dog Weston out for walks in the hills of West Van or in the forest. I find that it's a great way to get exercise, fresh air, and relieve some stress all while getting the dog out at the same time. Other than that, I volunteer at the Kiwanis North Shore Housing society as a director and chair of the governance committee. I enjoy being a part of this society as it assists lower income seniors with residential accommodations.

BCPIP: What are you looking forward to the most for the future of the trust company?

Sandra: I am looking forward to getting the trust company operating and starting to help our clients in a way that will truly impact in their financial lives. I really believe that we will be able to fulfill what Marian envisioned for her clients when we first started this new venture which will increase the synergies of our other services.

BCPIP: Thank you Sandra, we are all looking forward to this next chapter in BCPIP's life.

Client Profile

Aryn and Reza Khan

In this issue, we profile Dr. Aryn Khan. Throughout this interview, we learn about the exciting life of rural doctor in Vanderhoof.

BCPIP: Tell us a little about yourself.

Aryn: After I finished my masters at U of A, I worked in the UK as a drug rep and that is where I met Reza. At that time, I contemplated going to medical school, but I enjoyed my job at Nestle and saw a huge opportunity cost for leaving to become a doctor. But with Reza's encouragement, we both decided to go back to school. Reza went to do business and I went to medical school. During my schooling and residency, we had two kids. It was really important for me to graduate with my class so I didn't take any time off during my pregnancies. Looking back, it seems ridiculous that I did that, but I was very determined to graduate. Now I am a GP, the head of learning for our hospital, the head of obstetrics and surgical services networks and help run our emergency department. It has been a really rewarding job to be in because I am able to keep surgeries and obstetrics alive in a rural town. I really love my

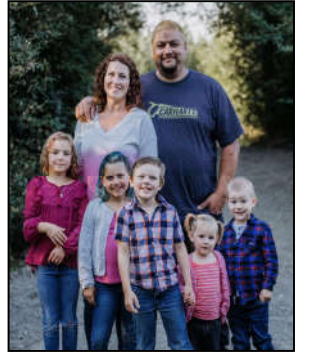
job and couldn't do it if Reza didn't sacrifice his career to stay at home.

BCPIP: Wow that is amazing, why did you decide to practice in Vanderhoof?

Aryn: I have always wanted to work in a small town. Growing up in Burns Lake, I knew that smaller towns were always underserved and had large health discrepancies from major cities. After medical school, I applied to small towns across Alberta and BC and fell in love with Vanderhoof. It was an added bonus that I would be close to family. Ever since coming here, I have loved it. I get so much variety in my job that I wouldn't get in a larger city. I get to do everything from delivering babies to end of life, to home visits, to obstetrics. Also, I can really feel the impact that I have in this community. I am able to know everyone here from interactions with the families of babies I deliver to loved ones I took care of before they passed. It has been such a satisfying job to have.

BCPIP: What do you like to do in your free time?

Aryn: I have a very busy household in a good way. We have 5 kids, 2 talking parrots, 4 dogs, 3 cats and a couple of fish. That's our zoo! It's busy, but it is so much fun because there is never a



dull moment. We recently adopted two new children this past February. Reza and I have always wanted to adopt ever since we met and after 4 years of being on the waitlist, we were finally able to adopt two amazing children. So my free time is really spent with my family and getting everyone where they need to go. For myself, I wake up every morning at 6 to cycle with a friend which is nice because I get to spend time with them and get my sweat on before work! I am also a huge coffee fanatic and love to cook and bake for my family. We also visit new students and residents every so often either by showing them around or having them for dinner.

BCPIP: What are your plans for the future?

Aryn: I am thinking of a vacation. We recently finished all the adoption stuff and our two new kids now officially belong to us. So once we get them passport we are going somewhere warm and tropical!

BC Partners In Planning Ltd.

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