

Britam

With you every step of the way

Britam Trust Fund

For Individuals & Families

FRIENDS
FOR
LIFE

About Britam Trust Services

Britam Trust Services was incorporated to provide controlled and efficient set-up and management of trusts in Kenya. The provision of trust services by Britam is one of the key reasons that has led to its remarkable growth to become an influential player in the financial services sector.

What is a Trust Fund?

A trust fund helps protect your money, assets, and loved ones by ensuring everything is managed exactly the way you intended.

You decide:

- Who benefits
- What assets are held or funds are used for
- When support is given
- How long support lasts

You create the plan. We help make sure it happens.

Britam Trust Solution Offering

Britam offers two types of Trust based on the assets you wish to be held in trust:

Cash Trust

A trust solution designed to hold and manage cash (only) for the purpose of meeting predefined needs such as education, medical care, upkeep or maintenance and other long-term support.

Family Trust (Private Trust)

A flexible estate planning solution designed to hold various types of assets including real estate properties, business, investments, cash etc. across generations

Why consider a Trust Fund?

Life can be unpredictable. A trust fund helps ensure the people you care about continue receiving support even when you're no longer able to manage things yourself.

A living trust is created during your lifetime to protect assets during your lifetime and helps ensure the people you care about continue to receive support as per your instructions even when you're no longer able to manage things yourself



How does a Trust Fund work?

A trust fund involves three key people:



Simple. Structured. Secure.

Flexibility & Fund Management

Your Trust grows with you. Life changes, and your Trust can too.

While you are alive, you can:

- Add funds
- Change beneficiaries
- Update instructions
- Adjust fund purposes

How funds are managed

When support is needed, required documents are submitted and payments may be made directly to schools, hospitals, or approved service providers.

Funds held in trust are invested to earn long-term returns for growth and wealth preservation



Frequently Asked Questions

Can I still access my money?

Yes. You remain in control while you are alive.

Can I add more funds later?

Yes. You can top up your Trust anytime.

Are Trust funds invested?

Yes. Funds may be professionally managed to preserve and grow value.

What happens after I pass on?

The Trust continues according to your instructions.

What assets can be placed in a Trust?

Cash, property, businesses, investments, insurance benefits, and more.

Getting Started

Setting up a Trust Fund is simple.

Required documents:



Trust application form



ID/Passport copy



KRA PIN copy



Beneficiary documents



Guardian documents
(for minors)

Let's help you protect what matters most

Speak to a Britam Trust Advisor today.

Call: 0705 100 100 | Email: trustfunds@britam.com

Why Britam Trust Services?

- **Trusted Expertise**

Professional trust management you can rely on.

- **Financial Strength**

Backed by one of East and Central Africa's leading financial groups.

- **Professional Fund Management**

Funds are managed with long-term preservation in mind.

- **Transparency**

Receive regular updates and statements.

- **Integrity & Accountability**

Strong governance you can trust.



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