



Wealth Management  
Dominion Securities



## Cemetery trust management

Cemetery care and maintenance trust funds exist to ensure that burial grounds are properly maintained for generations to come. Whether run by a municipality or corporately owned, perpetual care requirements within cemeteries mean these funds must be invested in a way that balances long-term growth and stability with the need for consistent income generation. The TK Investment Trust Portfolio is specifically designed to align with these requirements and delivers a turnkey solution aimed at growing your capital while also ensuring your cemetery has the cashflow to maintain a respectful and peaceful environment.

In alignment with all provincial and bereavement authority requirements, the asset mix of the TK Investment Trust Portfolio allows for steady, long-term growth hedged against interest rate, currency, and concentration risks while the specific companies chosen provide a steady dividend stream to maintain funding levels for the cemetery. A focus is placed on global companies that pay a sustainable dividend generating strong cash flows, are attractively valued on a risk-adjusted basis, and provide principal security through substantial downside protection. The TK Investment Group has extensive experience in cemetery trust management with an approach that was specifically designed to meet the unique needs of cemetery and funeral professionals.

### Our investment approach

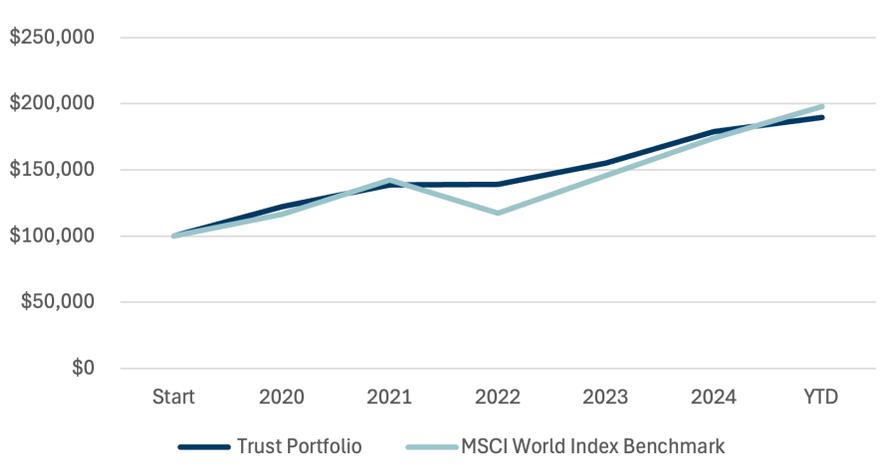
Firmly rooted in sound portfolio management techniques, our global, sustainable, value-based approach was designed specifically to meet the unique needs of Cemetery Trusts.



## Historical performance

2020	2021	2022	2023	2024	2025 (YTD)
22.10%	12.00%	0.20%	10.40%	13.30%	6.50%

Our investment approach helps organizations better align their values, principals and standards while providing stable capital growth and sustainable income to meet specified objectives.



The chart above shows the growth of funds since inception through to 2025. An investment of \$100,000.00 would be worth \$191,000.00.

## Target dividend

	\$100,000		\$1,000,000	
	Monthly	Annual	Monthly	Annual
<b>3.25%</b>	\$271	\$3,250	\$2,708	\$32,500
<b>4.00%</b>	\$333	\$4,000	\$3,333	\$40,000

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