



## Your success is measured by more than numbers

When it comes to custody, escrow and guardianship services, success is about caring for your financial life and legacy. Your assets will be coordinated, integrated and managed by our skilled and passionate professionals. From initial planning, to implementation, to execution, you can count on our experts.

### **Custody services**

There's great peace of mind in knowing your assets are safely and conveniently located in one place. The services you receive from us include holding your assets, collecting and holding all income, paying bills out of your account and providing a details summary upon request.

### **Escrow accounts**

Escrow accounts come in all shapes and sizes. Your specific needs matter to us, and our flexibility ensures a customized plan for you. Your interests will always be handled in a professional and equitable manner by an experienced advisor.

### **Guardianships**

Handling financial decisions for those who cannot choose for themselves is a responsibility we take seriously. As guardian of your estate, the needs of your beneficiary and your wishes are a priority when we help you craft an investment plan. We regularly work with many probate courts and offer a trained voice of experience when it comes to asset management and court reporting.