



Your trust is a legacy we'll faithfully uphold

A trust is a legal document designed to carry out the management and distribution of your assets during and after your lifetime.

A trust can help you keep control over your assets while you are living, and if you become physically or mentally incapacitated. After you pass away, a trust can help you avoid probate, reduce legal fees, and even provide tax savings. If you have concerns about your heirs receiving assets outright, a trust can help by providing guidance on how they will receive their inheritance.

Creating a trust is a collaborative effort involving you and your designated team of professionals. We will act as your liaison, coordinating and communicating with your team to simplify the process for you and your family. Our number one goal is to see your vision fulfilled. Whether you need minimal assistance or a higher level of guidance, we'll be there to offer direction.

Types of trusts

- Revocable Living Trust
- Charitable Trust
- Spendthrift Trust
- Bypass Trust
- Marital Deduction Trust
- Special Needs Trust

What we can do for you

Our professionals can serve with consistency as trustee, co-trustee, or agent, and perform the following duties:

- Provide timely distributions based on your objectives or as directed by an individual trustee.
- Provide all regular account and investment statements.
- Facilitate and file federal and state income tax returns and provide summary information to beneficiaries.
- Safeguard and invest trust assets according to trust goals and objectives.
- Manage trust assets, including residential and commercial real estate and closely held securities.
- Schedule and hold regular meetings with your portfolio manager and trust officer to review trust investments, performance, administration, and other needs.
- Pay bills for personal and household expenses.



Should I use a corporate trustee?

We consider serving as your corporate trustee a privilege. We've been honored to represent our customers' trusts for decades. Our longevity, collective experience, and available resources are more than any one individual could possess. And, we have access to extensive investment management resources, which help us provide better service and greater expertise. As experts, we are also held to a higher standard than non-professional trustees. Trust law requires us to act under a code of fiduciary responsibility which puts the needs of our customers first. You can count on us professionally, and personally, to act in your best interests.

Most importantly, we can provide unbiased service whenever we are called upon to do so. Using a corporate trustee helps to preserve the family relationship, as no one family member is charged with overseeing another. If there are difficult decisions to be made, we're able to make them without fear of creating family conflict.

There are many benefits to having a trust, and it can be structured to provide the flexibility needed for your circumstances. We have decades of experience and are ready to be on your team, supporting your goals.