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Fiduciary Services and Estate Planning

Team

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Overview

Planning for the future includes the thoughtful transfer of assets to the next generation.

Collaborating with estate planning attorneys, we offer objective guidance regarding tax-efficient wealth transfer. Our investment advisors, in conjunction with our fiduciary specialists, put those plans in place, managing investments for the benefit of current and future generations.

In addition, our officers act as individual – not corporate – trustees. This assures personal wishes are carried out with more individual attention and commitment to the desire of the client, while still providing independent, unbiased administration of the trust assets. Likewise, we serve as executors of client wills, overseeing the estate settlement process on behalf of heirs.

Our work includes:

- Trust and estate planning
- Trust and estate administration
- Executor services
- Collaboration with estate planning attorneys and other advisors

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