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### What?

A **person without emotional ties** to an estate who is entrusted to make decisions for the estate based on the goals set forth by the trust creator (estate owner).

### Why?

You need help managing your trust. Perhaps you feel overwhelmed by the responsibilities or you want to **avoid conflict between family members** that can arise when one is chosen to be the trustee. But, **you like your team of attorneys and financial advisors** and don't want to lose them by engaging a corporate trustee.

### How an Independent Professional Trustee can help you

- A **collaborative** approach
  - Personalized, **responsive** attention you do not receive from a corporate entity
  - You are never more than one phone call away from your trustee who is a part of your team along with your attorneys and financial advisors
  - **No conflict of interest** between administering the estate and investment advice
- Provides **continuity** between generations
- **Customized services** based on your needs and **adaptable** to changing circumstances