

# PROFESSIONAL TRUSTEE SERVICES

TCA TrustCorp America

The duties of a trustee can be complex. Enlisting the services of an independent professional trustee like TCA TrustCorp America (TCA) will help ensure that your trust will be administered in accordance with your wishes and written objectives. You can enjoy the benefits of professional trust services without giving up the expert investment management you expect and deserve from your financial advisor.

## THE ALLIANCE

We have chosen TCA as a premier partner for its flexibility, expertise and efficiency as a professional trustee. This alliance provides you with an extensive and comprehensive trust solution.

## RELATIONSHIP AND ASSET MANAGER

Traditionally, the professional trustee manages a trust's investment assets. However, in our alliance with TCA, your financial advisor can remain your primary advisor and continue to be your main contact for questions regarding suitable investment services for your trust. Your financial advisor will work with you to help you meet your financial needs; review your trust investment portfolio to help meet the established investment objectives; and provide you with sound, current and effective investment advice.

## TCA TRUSTCORP AMERICA — TRUST ADMINISTRATOR

With your financial advisor managing your trust assets, TCA, as an independent-trustee, is able to focus on what it does best: maintaining fiduciary oversight obligations. TCA has successfully provided personalized, efficient and friendly administrative fiduciary services since 1994. For clients seeking to avoid the big bank trust department mentality, TCA may offer a welcome and flexible alternative.

## FLEXIBILITY

TCA provides principle and income accounting, compliance with state and federal trust administration regulations and full state and federal tax reporting. Agency relationships, bill paying for trusts and trust and estate settlement services are also available.

## EFFICIENCY

The annual trustee fee, as reflected in the fee schedule, is 50 basis points, with a minimum annual fee of \$2,500. We believe this is a real value, given the reliability and responsiveness of the services provided. TCA's fees are highly competitive.

## EXPERTISE

TCA's personal trust capabilities include:

- Irrevocable trusts
- Grantor trusts
- Charitable trusts
- Trusts under will
- Revocable trusts
- Life insurance trusts
- Special needs trusts
- Trustee and co-trustee
- Agent for trustee and executor
- Executor and personal representative

## HOW CAN WE HELP?

We have access to independent professional trustee services with TCA, which provides trust account management and administration, while you continue to receive the personalized investment management services you've come to expect.

Talk with your financial advisor today about the benefits of professional trustee services.

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