



## Fiduciary Partners Trust Company - Case Study

### *“I Need Help with My Daily Financial Affairs”*

**The Problem:** Sally Richards’ husband Jim died two years ago. Although it had been a difficult readjustment period, Sally had been able to continue managing her finances with the help of her long-time financial planner and investment advisor, Roberta Jones, until recently. Now, serious health issues are preventing Sally from attending to routine financial matters such as paying bills and estimated taxes, tracking medical insurance claims, looking after household repairs and maintenance, and numerous other administrative details Sally has handled most of her life, especially since Jim died. Sally asks Roberta for help paying her bills and other administrative duties.

**The Solution:** Roberta knows that she is unable to pay Sally’s bills and handle other administrative duties for her, since these fall outside the services offered by Roberta’s employer. She offers Sally a practical suggestion: hire Fiduciary Partners Trust Company to handle the bill paying and administrative duties.

In talking further with Roberta and a Fiduciary Partners trust officer, Sally learns that Fiduciary Partners is an experienced, independent trustee that specializes in providing administrative services just like the ones she needs help with. By hiring Fiduciary Partners, Roberta will still be able to manage Sally’s investments and coordinate the other aspects of Sally’s financial planning, since Fiduciary Partners does not offer these services and specializes in partnering with financial professionals like Roberta.

After talking with her attorney, Sally decides to set-up a revocable living trust (drafted by her attorney) to help coordinate her finances and overall estate plans. The trust document names Fiduciary Partners Trust Company as trustee, and further directs that Roberta’s firm be named as investment manager for the trust. Sally is pleased and relieved to find such a practical solution for a difficult dilemma.

### FIDUCIARY PARTNERS TRUST COMPANY

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