



## Fiduciary Partners Trust Company - Case Study

### *“My Will Fires My Investment Advisor”*

#### **The Problem:**

Tom, my investment advisor, and his team have helped guide my financial and investment management for many years. They know me, they understand my circumstances, they know how I tick and what is important to me for my family’s financial future. In short, *I trust them*, and it is important to me that they continue to guide my investments for me and my family, both now and in the future.

Now I see that my will and trust(s) name my bank trust department to take over when the time comes that I can’t direct my own finances, due to my incapacity or death. I don’t know anyone at the bank trust department and I’m sure they don’t understand me or my family. I *do* know they have their own investment department and staff who will take over the management of my investments and fire Tom and his team.

Here’s my dilemma: how can I get high quality professional trustee services for my family’s future, *and* still have my long-time investment advisors involved to guide the investment of my family’s wealth, since they have done so well for me over the years?

#### **The Solution:**

The use of a professional trustee can be a critical factor in meeting your goals for your estate plan. ***Fiduciary Partners Trust Company*** is a privately-held, independent professional trustee, whose business is to provide high quality trust administration services, while partnering with experienced investment professionals (like yours).

By naming Fiduciary Partners Trust Company as trustee or successor trustee in your will or trust(s), you can have the best of both worlds – high quality independent professional trustee services *and* the continued guidance of your investment advisor in the management of your assets, now and in the future.

#### FIDUCIARY PARTNERS TRUST COMPANY

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