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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

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