TRUSTEE SERVICES

Legacy Trust

Protecting Your Legacy

Legacy Trust is dedicated to providing comprehensive, customized fiduciary services to families. Our team offers trust administration services, manages complex reporting and meets all tax filing requirements while diligently working to build meaningful relationships with you and your beneficiaries. We'll also work alongside your estate planning attorney and other professional advisors throughout the administration process.

TRUST ADMINISTRATION

We specialize in sophisticated personal trust services to meet your family's personal, tax and estate planning needs. You can trust our wealth advisors to construct creative trust strategies and provide continuity throughout the duration of the trust.

TRUST & ESTATE SETTLEMENT

The Legacy team is here to guide you through the complicated estate settlement process. We inventory, value and secure all estate assets, including real estate, personal property and closely held business interests and, if required, arrange for the sale of these assets.

DIRECTED TRUSTS

We are fully equipped to act as your family's Direct Trust advisor, working on discrete aspects of trust administration such as investment management or distributions to beneficiaries. Our experienced wealth advisors are well-versed in managing investments and thoughtfully exercising discretionary powers to make distributions to beneficiaries.

AGENT

As your agent, we offer a full range of investment management services, including constructing the trust's investment policy statement, implementing the trust's investment strategy and managing investments for the future.

CUSTODIAN

Our (custodial) services include safekeeping trust assets, settling trades, collecting income, distributing assets and rendering statements.

SPECIAL NEEDS TRUSTS

We specialize in supplemental needs trusts often used to provide supplemental care to disabled or incapacitated individuals while protecting their assets.