Advisory Services for the Non-Professional Trustee

Serving as a fiduciary, whether that is as a Trustee, a Conservator, or a Personal Representative, can be a very challenging and sometimes a long-enduring responsibility. Someone, usually a relative or dear friend, had a great deal of confidence in your character and capabilities when they nominated you to take on this role. But it's not a role most people perform often and it's vital that the job be done properly and efficiently. Although we can't do it for you, we do know how to do it and we're here to help.

With our unique experience with trusts, estates and conservatorships, combined with our knowledgeable and compassionate approach to client service, Capital Financial Planners, LLC can offer to the non-professional fiduciary, assistance with:

- **Investments & Asset Management** – *often, fiduciary accounts such as irrevocable trusts, conservatorships, and even some estates, require special care and expertise. We have the right knowledge and experience for this.*
- **Portfolio Review –** *to confirm the assets have been properly titled, beneficiary designation properly made, and review of non-security assets.*
- **Administrative Advice and Counsel** – *although we cannot provide legal or accounting advice, we can assist a Trustee with many basic, day-to-day administrative tasks which a Trustee may need to perform. We are familiar with the governing regulations such as Uniform Trust Code, the Uniform Principal and Income Act, and the Uniform Prudent Investor Act.*
- **Discretionary Distributions** –*while the ultimate authority to make distributions resides with the Trustee, we are available to offer our financial analysis and recommendations regarding the possible affects that distributions may have on an account.*
- **Collaborative Estate Planning–** *Thoughtful and effectively executed estate planning is a critical aspect to one's financial life. And while we cannot serve as the Fiduciary, and we are not lawyers or CPA's, we recognize the importance of each party fulfilling its role in harmony with the others. With our deep connections in the estate planning community, we know who to call when assistance from another professional discipline is needed.*

Lastly, in working with us as an Advisor, the Trust will receive expert service, non-legal administrative counsel, and experienced investment management services at a level of expense often less than what a corporate Trustee might charge, but you as the non-professional Trustee remain in control. Our management fees start at 1% with a minimum account size of $500,000.

It takes time, knowledge, and skill to be someone's fiduciary, and it often takes a team working behind that person to make sure it's done right. We're ready to be an important part of that team.

Give us a call if you'd like to talk.

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