

It's A Matter of Trust



Choosing qualified trust professionals is an important part of estate planning. How do you counsel clients and potential clients about the qualities of an effective trustee? To help you the Iowa Trust Association has produced a brochure outlining the qualities of an effective trustee and the advantages and a corporate trustee.

When you're updating your estate plan, one of the most important decisions you'll make is the selection of your executor and trustee, who will be responsible for carrying out your wishes.

Consider the qualities that make an effective trustee:

- Investment management expertise** – keeping your assets adequately diversified and allocated in such a way that the portfolio provides the necessary income and growth to meet the needs of your beneficiaries.
- Objectivity** – exercising discretion in making decisions about how much to distribute, to whom and when is both an art and a science – this is the single most critical function a trustee performs.
- Availability** – being there when needed to perform the tasks required on a timely basis.
- Knowledge of fiduciary & tax law** – ability to properly interpret and follow the terms of your will or trust, consistent with applicable laws that govern the arrangement and ensure all tax matters are addressed correctly.
- Fiduciary accounting expertise** – properly accounting for principal and income ensures your beneficiaries receive what they are entitled to.
- Permanence** – some trusts last for years or even through generations. Consistency of administration of the trust ensures beneficiaries are treated fairly.

A corporate trustee will have all of these qualities and, in addition, will provide the following advantages:

- Experienced professionals, educated in trust and tax law
- Locally delivered, personalized service
- Professional asset management
- Full array of services, including bill paying, and estate settlement
- Flexibility in tailoring services to meet your specific situation
- Legal and regulatory oversight

By working with qualified professionals, you can ensure that your wishes are carried out in a manner that is appropriate to your family's circumstances. We'll be glad to visit with you in person to answer your questions about how we can serve your needs.

Be sure to consult your attorney and tax advisor when updating your estate plan.

Order a supply of these brochures today. To see the complete text of the brochure, go to www.iatrust.com.

IT'S A MATTER OF TRUST

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Suite 000
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When it comes to making decisions about your estate, choosing qualified trust professionals is an important part of the decision-making process.

This cost effective brochure is 5½” x 8 ½” and can be personalized with your bank name, address, city state, phone and web address. Educate your trust clients about the qualities that make an effective trustee with these helpful brochures.

Developed and produced by the Iowa Trust Association.
PO Box 6200 • Johnston, IA 50131 • 800-800-2353 • www.iatrust.com



Iowa Trust Association “It’s A Matter of Trust” Brochure

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