

**WEALTH ADVISORS**  
*Trust Company*

In the beginning..

The passing away of a spouse is life-changing. Emotional and overwhelming to say the least. The financial forefront is not even on the back burner, possibly not even on the stove. A widow or widower may not have been included in financial decisions but immediately placed into the role. This sets the stage for what our Wealth Advisors Trust Company client faced.

Trepidatious, stepping into the new frontier of surviving spouse and co -trustee, our client was scared. The unknown of how to partner with a Corporate Trustee was frightening. Wealth Advisors Trust Company came to the rescue immediately.

A warm face-to -face introduction to our onboarding team, followed by step-by-step instructions on what would be needed, began to ease the process. She was not alone, WATC would be there to guide the way. As the relationship began to be built, more players were introduced. Again, in virtual person to show the people behind the curtain and tear down any misconceived perceptions of scary trustees.

When the onboarding process was complete, a cordial handoff to the already-known administration team eased all fears and the transition was seamless. Her Corporate Co-Trustee was not a controlling entity but rather a cohesive group of service providers providing her guidance with a white-glove approach and a team dynamic.