WEALTH ADVISORS

Trust Company

Wealth Advisors Trust Company (WATC) has built a reputation for providing top-notch service, personalized attention, and expert advice to clients in need of trust administration.

One of our clients, Sarah, approached WATC seeking assistance with managing a friend's trust. She was overwhelmed with the responsibilities of being a trustee, and was looking for a professional and experienced team to help her navigate the complexities of trust administration. But she still wanted to be involved–as co-trustee.

WATC asked Sarah to bring to the conversation the financial advisor managing the trust assets offering comprehensive financial planning. The collaborative team of the WATC, Sarah (co-trustee), and the financial advisor created a game for the beneficiaries of the trusts Sarah was original acting as the sole trustee. Some of the key customized solutions were reducing the trustee fees (making the trust directed), streamlining distributions, and coordinating a comprehensive financial plan around the beneficiaries other non-trust assets.

The financial advisor focused on managing the trust's investments, a CPA specializing in trust beneficiary situations was brought in to do the trust tax planning and trust tax return. WATC dealt with all other compliance and trust administration issues. Sarah was always brought to provide context around the family history around trust distributions.

Sarah was impressed with the level of attention and care she received from WATC and the rest of the team. She appreciated the company's commitment to delivering white glove trustee services, and was pleased with the outcomes of the trust administration processall within a collaborative process.

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