

PERSONAL TRUST & FIDUCIARY SERVICES

CHOOSING THE RIGHT TRUSTEE

Choosing the Right Trustee

When selecting a trustee, many people consider a trusted family member or a close friend for the role. However, these individuals may not be prepared to handle a trust effectively and rarely have a full understanding of the issues and responsibilities involved in the process. In many cases a corporate trustee adds a depth of resources and objectivity that an individual could not provide.

Before making a final decision, it is important to take an objective look at the situation and consider:

PEACE OF MIND

One of the greatest benefits of partnering with a professional trustee over an individual trustee is professional trustees are subject to:

- Regulatory oversight
- State examinations
- Audits



EXPERIENCE

An effective trustee offers expertise in trust administration, investment management, accounting, recordkeeping and is responsible for filing necessary tax returns. A professional trustee also keeps current with the ever-changing and complex laws regarding trust administration and will apply those regulations to the trust. An individual trustee may be burdened by these responsibilities.



CONTINUITY

One of the principal reasons for establishing a trust is to provide for the future. It is important to remember that over the years, age or illness could prevent an individual from performing the duties of a trustee.

In naming a trustee, you want to be sure that as your family's situation changes and time takes its toll, your trustee will continue to be responsive. Partnering with a professional trustee ensures a level of continuity that individual trustees cannot provide.

CONSISTENCY

It is crucial that all family members feel they are treated fairly and consistently. This can be achieved more easily with a nonrelated, objective party such as a professional trustee.

FAMILY HARMONY

A professional trustee exercises a duty of loyalty and impartiality by administering the account for the financial wellbeing of current and future beneficiaries of the trust.



World-class Trust Services

Arden Trust can act as sole trustee or as co-trustee with the client, friend or relative. By appointing Arden Trust a corporate trustee, you will have a team of dedicated, full-time professionals working to administer your assets providing you with world-class trust services and ensure that your trust is:



Our experienced trust professionals work closely with clients, their legal and financial advisors and family members to streamline the complex duties of administering a trust providing everything from estate settlement services to acting as corporate trustee.

Trust Offerings

Charitable Trusts	Dynasty Trust	Marital Trust
Credit Shelter Trust	Foreign Grantor	Revocable Trust
DE Asset Protection Trust	Irrevocable Life Insurance Trust (ILIT)	Special Needs Trusts
DE Directed Trust	Irrevocable Trust	Total Return Trust

Special Services

Agent for the Trustee	Principal & Income Accounting	
Agent for the Executor	Real Estate	
Endowments	Special Assets	AND AREAD TO ANY
Escrow Services	Estate Settlement	
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For more information about Arden Trust Company and how our personal trust services can help you and your clients,

CONNECT WITH OUR SALES TEAM

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