

# Fletcher Tilton<sup>PC</sup>

Attorneys at law



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## TRUST SERVICES

### PRACTICE GROUP

The preservation of wealth is one of the cornerstones of Fletcher Tilton's law practice. Through estate planning, administration and asset management, our trust and estate attorneys carefully effectuate our clients' goals. These goals generally include the preservation of wealth, minimizing taxes paid on its transfer, and ensuring its availability for use by future generations.

#### MANAGEMENT

The Trust Department of Fletcher Tilton currently manages over 250 accounts having a combined market value in excess of \$500,000,000. These accounts include trusts and estates with investment decisions being made by trustees and executors who are Fletcher Tilton attorneys, and a small number of custodial accounts with investment decisions being made by the owners.

#### INVESTMENTS

Investment decisions regarding asset mix, total return and the purchase and sale of individual securities in respect to trusts and estates are made by the managing attorney serving as the trustee or executor. Those decisions are made with the aid of weekly investment research supplied to our Trust Department by several major investment houses. Our trust and estate attorneys, who collectively form the Investment Committee, also meet on a monthly basis with an investment advisor retained by Fletcher Tilton. Our investment advisor maintains research and current price and earnings information on a universe of approximately two hundred stocks it deems appropriate for fiduciary accounts. Additionally, at our request, our investment advisor maintains a Primary Equity Selection List which serves as a benchmark guide to those trust and estate attorneys making investment decisions.

#### SECURITIES

Cash and securities, whether part of a trust, estate, or custodial account are deposited with a custodian bank. The securities are accounted for through the Depository Trust Corporation (DTC) which operates a nationwide electronic transfer service to which all banks, securities dealers and trust departments subscribe. Through this service, securities are purchased or sold, and dividends and interest are credited to the accounts electronically.

#### SERVICES

Trust services may include receipt, safekeeping, investment and reinvestment of trust and estate assets, processing of securities transactions, maintenance of necessary records, preparation of fiduciary income tax returns, collection and distribution of income, monthly, quarterly or annual statements of transactions and valuation of investments and, upon request, payment of client bills, charitable gifts, estimated tax payments, and the like.

#### RESPONSIVE SOLUTIONS

Two simple words that explain our commitment to you. Being responsive is a critical element in building a strong attorney-client relationship. Whether you are a new or existing client, we'll be quick to respond to your needs with the knowledge necessary to find solutions to your legal concerns.