

INVESTMENT ADVISOR'S LEADING INDEPENDENT

NEED TO BE convinced to get involved in the trust game? The number of trusts in the United States has doubled since 1997; trust assets are expected to double again by 2011 to over \$7 trillion; and the average annual fee to an investment advisor to a trust is \$12,500. If those numbers (all from *Trusts & Estates'* 2005 survey of the trust industry) don't convince you, Bob Oehschlager of Santa Fe Trust (one of the advisor-friendly independent trust companies listed below) reminds us that trusts reduce or eliminate probate expenses, estate

	401(k) plans	Asset management	Court-created trusts	Custodial services	Daily valuation services	Employee benefit services	Estate administration	Estate settlement	Fiduciary services	Financial advisory svcs.	Foundations	Institutional trusts	Investment services	Non-depository trust svcs.	Outsourcing services	Personal trusts	Retirement plan mgmt.	Traditional trust svcs.
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EXETER TRUST COMPANY		•	•	•	•			•		•	•	•			•	•	•	•
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¹FSB via Fidelity Institutional Wealth Services; ²Through National Independent Trust Co.

TRUST COMPANIES

taxes, and capital gains taxes, and are great for charitable giving. Oehlschlager suggests, too, that you add “trust account investment management” as one of your service offerings; recommends you join your local estate planning council to network with estate planning attorneys; and that you seek referrals from personal injury attorneys, CPAs, banks without their own B/Ds or trust departments, and even psychotherapists. “Feed them first,” in providing referrals, he counsels, since “chances are you’ll get referrals back.” —**James J. Green**

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³Springfield Trust is a division of Missouri Trust & Investment Co.; ⁴Wilmington Trust Retirement and Institutional Services acquired AST Capital Trust Co. 4/30/08