

Professional Trustee Services

Comparing Trust Services Providers

When clients either desire or receive a recommendation from their estate planning attorney to name a professional trustee, they select a bank or trust company. Banks and trust companies often follow what may be considered a “traditional” approach to providing trust services, which may not “fit” with what clients are looking for today, particularly clients like you who work with an RBC Wealth Management® Financial Advisor.

When it comes to involvement by your Financial Advisor, most banks and trust companies are reluctant to share information or take investment related recommendations. Investment options may be limited to a few model portfolios made up of proprietary products and lack investment performance information. Some larger banks and trust companies provide service through a 1-800# or call center approach, under which a client may talk to a different person each time they call.

Does your current professional trustee:

- Provide the level of service you desire — personalized and with one person as your contact?
- Offer customized and flexible investment options?
- Provide statements that are easy to understand and include investment performance information?
- Share information with and take recommendations from your RBC Wealth Management Financial Advisor?

- Offer services for management of non-financial assets such as real estate or a closely held business?
- Have a high level of administrative staff turnover, reassigning your trust from one person to another?
- Charge fees that are commensurate with the level of service and options provided?
- Specialize in fiduciary services, or offer them merely as a sales vehicle?

These are all important considerations when selecting a professional trustee to administer and manage your trust.

HOW CAN RBC WEALTH MANAGEMENT HELP?

As a client of RBC Wealth Management, you have access to professional trustees who provide trust account management and administration, while you continue to receive the personalized investment management services you’ve come to expect from your RBC Wealth Management Financial Advisor.

Talk with your Financial Advisor today about the benefits of professional trustee services available to RBC Wealth Management clients.

Trust services are provided by third parties. Neither RBC Wealth Management nor its Financial Advisors are able to serve as trustee. RBC Wealth Management does not provide tax or legal advice. All decisions regarding the tax or legal implications of your investments should be made in connection with your independent tax or legal advisor.

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