

Professional Trustee Services

Comerica Bank & Trust, N.A.

The duties of a trustee can be complex. Enlisting the services of a professional trustee like Comerica Bank will help ensure that your trust will be administered in accordance with your wishes and written objectives. Working with Comerica Bank, clients can enjoy the benefits of professional trust services without giving up the expert investment management they expect and deserve from their RBC Wealth Management® Financial Advisor.

RBC WEALTH MANAGEMENT AND COMERICA – THE ALLIANCE

Since 2000, we have partnered with Comerica Bank & Trust, which specializes in personal trust and estate administration, to bring professional trustee services to our clients. The alliance combines the strengths of two great companies to provide clients with an extensive overall financial service package.

RBC WEALTH MANAGEMENT – RELATIONSHIP MANAGER

Traditionally, the professional trustee manages a trust's investment assets. However, in our alliance with Comerica Bank, your Financial Advisor can remain in place as your relationship manager and act as your main contact for questions regarding the investment services for your trust. Your Financial Advisor will work with you to help you meet your financial needs, review your trust investment portfolio to help meet the established investment objectives, and provide you with sound, current and effective investment advice.

- Financial Advisor manages your trust relationship
- Financial Advisor provides investment services for your trust account

COMERICA – TRUST ADMINISTRATOR

You will also have a dedicated Comerica Bank Trust Administrator working on your behalf. Your Trust Administrator will provide a full range of trustee services including maintaining account records, distributing funds, filing trust tax returns and fulfilling the requirements set forth in the trust agreement.

GAIN THE PROFESSIONAL TRUSTEE ADVANTAGE

Comerica Bank has experience with all kinds of trusts and all kinds of assets, including stocks and bonds, real estate, farms, closely held businesses, mineral properties, international investments and collectibles.

- Comerica Bank is qualified to provide trust services in all 50 states and Washington, D.C.
- One-on-one trust administration
- Experienced and professional full range of trustee services

HOW CAN RBC WEALTH MANAGEMENT HELP?

We have access to professional trustee services with Comerica Bank, which provides trust account management and administration, while you continue to receive the personalized investment management services you've come to expect from RBC Wealth Management.

Talk with your Financial Advisor today about the benefits of professional trustee services.

Professional Trustee services are offered to RBC Wealth Management clients by different entities including Comerica Bank & Trust, N.A. (Comerica), who may serve as trustee. RBC Wealth Management and/or your Financial Advisor will receive compensation in connection with offering or referring these services. 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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RBC Wealth Management®