

# Why Use a Professional Trustee?

Trustees may have to make tough decisions that might not be popular with all your beneficiaries; after all, the trustee is carrying out your instructions, not your beneficiaries' wishes. This can be a difficult role to fulfill. A family member may be biased, or may wish to act in a manner that avoids hard feelings within the family, rather than carrying out your instructions. Also, few family members have investment management skills or expertise in fiduciary law and practice and even if they do, the time, effort and potential conflict mean they are often best used in an advisory role.

- Unbiased loyalty and independence to carry out your wishes
- Knowledgeable management, protection, and defense of trust assets
- Experienced oversight of the investment process to be carried out by your financial advisor
- Timely and accurate statements of the account to keep you and all current beneficiaries informed
- Consistent annual reviews
- Accountable collection and prudent distribution of income and assets
- Tax reporting, filing and comprehensive regulatory compliance on behalf of the trust

The Private Trust Company is an independent trust company dedicated to the management of trusts and other family wealth arrangements such as family offices, businesses and foundations. The Private Trust Company dedicates its attention to serving the clients of Starr Financial and other financial advisors. Through The Private Trust Company, Starr Financial is able to deliver trust services and apply their high-quality service to every step of the trust management process.