

FIDUCIARY SERVICES

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After working hard to build your wealth and taking time to work with your attorney to create a customized estate plan, you want to be sure your final wishes are properly carried out. You want to choose expert, trusted professionals to protect, preserve, and distribute your wealth according to your wishes. This is where our fiduciary services team fits in.

Advantages of Attorney Fiduciaries

Understanding and responding wisely to complex personal, family, business, and wealth-generation dynamics are important skills for administering trusts. We have long made it our premier practice to strategically assist our clients in maximizing the positive effects of wealth while eliminating waste, uncertainty, anxiety, and conflict.

The fiduciary services team includes attorneys experienced in trust administration and other related areas of the law, such as probate, business succession planning, business law, tax, and real estate. Knowledge in these various areas of the law is often crucial for diligently administering trusts. For example, trust misinterpretations, poor tax planning, and poor management can all undermine your carefully crafted estate plan. Financial, investment, and accounting experts generally do not have the legal experience to prudently administer trusts to achieve the best wealth management outcomes. Therefore, having a knowledgeable attorney fiduciary can go a long way in assuring that your estate plan is effectively implemented.

What We Do as Fiduciaries

Our fiduciary services team performs the following services:

- *prompt and accurate distributions* according to plans and schedules;
- *charitable gift processing* and management;
- *tax services* including payments, reporting, and returns;
- *property management* ensuring preservation and maximization of value;
- *asset protection* against false claimants and creditors;

- *income collection* from reluctant, dilatory, or delinquent debtors;
- *transaction facilitation* such as the buying, selling, and transferring of assets;
- *payment services* for approved bills, charges, and expenses;
- facilitation of *family communications* and *family meetings*;
- *periodic projections* that enable you to forecast your legacy's impact;
- *benchmarked performance reports* ensuring management accountability;
- *asset schedules* reflecting estate values;
- *records maintenance* and *reporting compliance*; and
- *prompt and detailed responses* to inquiries.

Retain Trusted Professionals

The fiduciaries named under your estate plan should be able to understand each document as well as properly invest and manage your assets. The fiduciary services team at O'Neil Cannon, has experience with both drafting and administering estate plans and is always happy to serve clients in whichever role is needed. With our fiduciary services team, you can be sure that your final wishes will be carried out properly.

Contact the firm at 414-276-5000 or [online](#) now to learn more about our services. Lawyers
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