

PROFESSIONAL PARTNERS

As a trusted advisor, your clients rely on you to deliver strategic plans that reflect current and future life events. They clearly value your knowledge and advice. But they may encounter issues outside your typical scope of business and beyond your expertise.

What about the client who wants to ensure a generational transfer of wealth is protected from a potential divorce? Or the client who needs to provide for a child with special needs without bringing unintended consequences like the loss of government benefits? And the beneficiary who needs assistance hiring household help or keeping up with medications? Knowing when to bring in outside expertise enhances your value in your clients' eyes.

Chances are, you already work as part of a team that includes an estate planning attorney and accountant. There is no question that the services each professional provides are complementary ones—not competitive ones. Understanding trusts can provide an advantage to your business and by partnering with a corporate trust administrator like Cumberland Trust, you can grow the services you provide to your clients, improving retention and loyalty.

Separating the roles of asset and trust management gives us an important distinction over others in the field. Cumberland Trust does not manage investments, serve as an accountant, or create estate plans. Our work augments your professional services and we are often there for the family for the long-term, through multiple generations. Together, we can create innovative products that attract new clients. Your practice naturally expands. But most importantly, your clients' needs are better served.

To learn more about Cumberland Trust's unique platform, visit cumberlandtrust.com.



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