Some benefits of having a trustee

Investment and Insurance Products are:
- **Not Insured by the FDIC or Any Federal Government Agency**
- **Not a Deposit or Other Obligation of, or Guaranteed by, the Bank or Any Bank Affiliate**
- **Subject to Investment Risks, Including Possible Loss of the Principal Amount Invested**

Coach for wealth transition

Teaching financial literacy early can help establish a foundation of knowledge the younger generation can build on as they gain awareness and understanding by sharing your view of wealth and the strategies you've adopted.

Trusts can be used as an educational tool to:

- Discuss distribution standards for health, education, maintenance, and support
- Review alternative trust structures
- Create incentive trusts

Offer support and continuity

Trustees can support future wealth recipients by partnering with other financial professionals to continue the education and wealth transition process.

Execute your plan

Keeping well-informed about your estate plan at different life stages can be accomplished through the services of a corporate fiduciary. Key benefits include: regulation and oversight; availability of specialty services; objectivity; continuity across multiple generations; and asset management expertise.

This information is provided for educational and illustrative purposes only.

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