Introduction to professional trustee services

Exclusively for RBC Wealth Management clients

RBC Wealth Management

Establishing and managing a trust can be complex, requiring professional knowledge in trust laws and administration, as well as the proper operational infrastructure. Our approach is to work with established trust companies, tapping in to their organizational strengths. This allows us to deliver a full range of professional trustee services.

Our providers can administer all types of trusts, including revocable, irrevocable and charitable among others. Trusts can hold all types of assets such as financial, real estate or personal property in multiple jurisdictions nationwide.

RBC Wealth Management trust consultants are specialists who help financial advisors identify the unique trust needs of clients and match them with the most appropriate service provider. The following is a very brief description of our professional trustee services providers:

RBC Trust Company (Delaware) Limited

- Focus on high-net-worth and ultra-high-net-worth clients
- Target trusts of $2,000,000+
- Established in 1914
- Specializing in discretionary trusts, Delaware directed, dynasty trusts, and Delaware asset protection trusts

City National Bank

- Focus on high-net-worth and ultra-high-net-worth clients
- Target trusts of $2,000,000+
- Established in 1954
- National Bank Charter allows for trust administrative services in all 50 states
- Trusts with real estate and other unique assets
- Offering estate settlement and probate services

Comerica Bank & Trust, N.A.

- Focus on high-net-worth and ultra-high-net-worth clients
- Target trusts of $1,000,000+
- Established in 1894
- National association allows for trust administrative services in all 50 states
- Offers personal and institutional trust services, including estate settlement; specializes in directed trusts, special needs trusts, with expertise to handle unique and specialty assets, such as closely held businesses, mineral interests and non-financial assets

TCA TrustCorp America

- Focus on mass affluent and affluent
- Target trusts of $500,000+
- Accepts trusts of any size
- Established in 1994
- Offers comprehensive administrative services for a competitive fee

Midwest Trust

- Focus on mass affluent and affluent
- Targeted trusts of $1,000,000+
- Established in 1993
- Expertise includes special needs trusts
- Highly competitive fees

Your RBC Wealth Management financial advisor serves as your main point of contact regarding trusts. They are the investment advisor to the trust account owner (trustee/s) and manage investments under programs approved by independent trustees.

Talk to your financial advisor today about the benefits of professional trustee services. Not all products and services are available in all states.

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