

# STIFEL



## Successor Trustee Services

### Revocable Living Trust

A revocable living trust is a trust that a person creates during his or her lifetime. People create revocable living trusts for a variety of reasons, including:

- Avoiding probate upon the death of the creator of the trust;
- Providing for management of assets and expenses should the creator of the trust become incapacitated;
- Maintaining privacy (because trusts are private unlike the public probate process);
- Developing an estate and/or income tax planning strategy;
- Ensuring ongoing management of assets for the benefit of family members and other beneficiaries following the creator's death; and
- Protecting beneficiaries from losing their inheritance because of a lawsuit, divorce, or bankruptcy.

### Successor Trustee

The creator of the trust, called the “grantor,” will often be the initial trustee. A “successor trustee” is designated in the trust document to become trustee upon the grantor’s death or incapacity. It may be advantageous to name a professional corporate trustee, such as Stifel Trust, as successor trustee. Corporate trustees employ experienced personnel who are knowledgeable about specialized trust matters like record keeping, administration, and investing. Also, corporate trustees are impartial and are subject to various regulators.

As your successor trustee, Stifel Trust has no authority or involvement, provides no services, and charges no fees while you or another prior trustee is serving.

When the time comes for Stifel Trust to serve as trustee, we provide the following customary services:

Administration of the Trust According to Its Terms	Prudent Management of Trust Assets	Safekeeping of Assets
Collection of Dividends, Interest, and Other Income	Efficient Cash Management	Bill Payment
Payments to Beneficiaries	Preparation of the Trust’s Income Tax Return	Tax Information for Beneficiaries
Proxy Voting	Monthly Statements	

▶ For more information, please contact your Stifel Financial Advisor.

**Learn more at [www.StifelTrust.com](http://www.StifelTrust.com)**

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Investment Services Since 1890

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