Personal Trusts & Fiduciary Services

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Clients

Individuals & Families
Foundations, Endowments & Charities
Law Firms

Overview

Protecting your assets, preserving your wealth, and staying true to your intentions is our focus. As a full-service wealth management firm, we often serve as trustee on trust accounts. In this capacity we provide comprehensive support services, including management of cash distributions, bill paying, assistance with philanthropic programs and record keeping for fiduciary reporting.

We work closely with clients to ensure that each trust account is managed and administered according to their specific wishes and the needs of both donors and beneficiaries. Further, we collaborate with tax and legal advisors to protect assets from probate and limit tax liabilities.

Like everything we do at LBA, we take a very personal approach to our work as trustees. We have witnessed with alarm the role of trustee becoming increasingly corporate in nature, losing its original function of knowing and acting upon donor intentions. At LBA, we do not act as a trust committee, but rather as an individual trustee or successor trustee with personal connection to the creator of the trust and his or her family.

We carefully administer investments and distributions as prescribed by trust documents, balancing the sometimes competing interests of multiple beneficiaries. When needed, we apply our experience to equitably resolve conflicts among beneficiaries.

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