

Trust settlement is the process of settling an estate through a trust in addition to, or rather than, a will. Your financial advisor will lead you through the process with the expertise of The Private Trust Company (PTC).

The Private Trust Company is committed to delivering administrative trust services in a seamless manner—helping you maintain and strengthen your financial picture and transfer assets at death to those who mean the most to you.

To ensure the best service for you, The Private Trust Company accepts a new appointment only after careful review of the trust and its assets.

To learn more about the services of The Private Trust Company, please contact your financial advisor.

Trust Settlement Process

A Road Map for Working with Your Advisor and The Private Trust Company

