WE TRUST Company
PROFESSIONAL FIDUCIARY SERVICES

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What We Do as Professional Fiduciaries

We work as a trusted advocate in the space between a person, his/her attorney, CPA, financial advisor and loved ones to execute that person's business needs.

Daily Money Management[1]

Retained by the client on a month to month basis

Financial Advocacy Services:
- For clients whose circumstances require assistance from a trusted source
- Personal bookkeeping, home office administration

Family Office Services:
- Family office administration, record keeping, event and travel planning
- Researching and securing resources for home projects, property management
- Homebased business administrative support

Estate Plan Execution

Retained by the client by being named in one or more of the following roles in their estate planning:

- **AIF:** Agent under Durable Powers of Attorney (DPOA). Named to be an agent in business dealings in the event a person is unable to act on their own behalf.
- **PR:** Personal Representative: named in a Will to be the executor of an estate and guide it through probate. We also assist PR's, and are court appointed to be Administrators of estates.
- **Trustee:** As an independent Trustee, we are responsible for the administration of a Trust set up for beneficiaries. We assume the responsibilities of managing the Trust, but we do not manage funds.

Professional Support for Friends or Family in a Fiduciary Role

Assistance to people who need relief through professional support of their role as a fiduciary to a friend or family member.

[1] http://www.aadmm.com/dmms_and_you.htm