

UTMOST TRUSTEE SOLUTIONS LIMITED

USING A PROFESSIONAL TRUSTEE HOW WE CAN HELP YOU

Deciding who to appoint as a trustee is an important decision.

There are many advantages to choosing a professional trustee over friends or family to manage your trust:



AVAILABILITY

We all lead busy lives and it's easy to lose touch with friends and even family, either over time or due to them moving away. This can leave you or the remaining trustees with the issue of contacting or finding them. This will not be a problem with a professional trustee.



REGULATED TRUSTEE

Utmost Trustee Solutions Limited is regulated and licensed by the Isle of Man Financial Services Authority.



KNOWLEDGE

We make it our business to stay up to date on current trust law and best practice. Our staff also understand the nature of a trust and the duties and obligations a trustee owes to the beneficiaries.



IMPARTIALITY

When the time comes, we will ensure distributions are made in accordance with the terms of the trust. We will act impartially and where appropriate will take due account of any guidance you have provided in your letter of wishes.



CONFIDENTIALITY

You should consider if you want your trust arrangements to remain private during your lifetime. Appointing Utmost Trustee Solutions Limited allows you to maintain a degree of confidentiality over your affairs.



SIMPLICITY

From establishment of the trust to making the final payments to beneficiaries, we will take care of any business surrounding the trust. This includes tasks such as liaison with schools for the administration of fee payments or with executors for the payment of Inheritance Tax.

ABOUT UTMOST TRUSTEE SOLUTIONS LIMITED

As an established trust service provider for over 20 years, we can offer expert support in all matters regarding the administration of your trust. We are managed by fully qualified staff and have a dedicated team who will be there for you from the beginning of our appointment as trustee.

We maintain the Utmost Group's high standards and aim to offer a quality service to settlors, beneficiaries and financial advisers alike.

FICTIONAL CASE STUDY

John and Alison are planning to establish a discretionary trust to hold an investment bond for the benefit of their children and grandchildren.

Whilst both John and Alison are experienced in financial matters, they are also aware of the increasing burden being placed on trustees with additional reporting obligations required when setting up a new trust and periodically throughout the life of a trust and when it is eventually wound up.

John and Alison decide that they don't want their children or themselves to have to undertake those tasks.

Their adviser suggests that they appoint Utmost Trustee Solutions Limited, a company offering professional trust services, as their trustee. This would ensure a professional


trustee will be in place to manage the trust effectively and comply with its various responsibilities, as well as monitoring any new regulations which may be introduced.

In addition, they have the peace of mind that when they have passed away, the trustee will ensure that the trust fund is fairly and impartially allocated when the time comes to make distributions to their family. The service provides them with the reassurance that the trustee will have an understanding of their wishes and will fulfil the terms of their trust.


John and Alison complete the appointment forms and pay the appointment fee having decided that the professional trustee service offers a cost effective solution.

GET IN TOUCH

If you would like to find out more about appointing Utmost Trustee Solutions Limited as your trustee, speak to your financial adviser or contact us in the following ways:

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 trust.company@utmostwealth.com

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Please note that emails are not secure as they can be intercepted, so think carefully before sharing personal or confidential information in this way.

Telephone calls may be recorded.



Utmost Trustee Solutions Limited can act as trustee on Gift Trusts, or Loan Trusts holding either a Selection, Evolution or Delegation bond and also for Estate Planning Bond or Generation Planning Bond trusts.

To see our **Charges Schedule**, speak to your financial adviser or visit our website

www.utmostinternational.com

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www.utmostinternational.com

Calls may be monitored and recorded for training purposes and to avoid misunderstandings.

Utmost Trustee Solutions Limited is registered in the Isle of Man under number 106739C. Registered Office: King Edward Bay House, King Edward Road, Onchan, Isle of Man, IM99 1NU, British Isles. Licensed by the Isle of Man Financial Services Authority.

Utmost Trustee Solutions is registered in the Isle of Man as a business name of Utmost Trustee Solutions Limited.

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