TRUST SERVICES FOR INVESTMENT MANAGERS

WINTRUST
WEALTH MANAGEMENT

Outsourcing trust services to a local, accomplished trust company allows you to focus on what you do best while enhancing your value to your clients.

You won the business and helped them grow their assets. Now you can ensure your clients preserve and protect the fruits of their labor while retaining your firm's services as a trusted advisor. By collaborating with Wintrust Wealth Management's Trust organization—The Chicago Trust Company, N.A.—you are able to provide trust services while remaining in control of the relationship.

BENEFITS FOR YOU

Partnering with us to offer trust services allows you to add value to your client relationships:

- Create and maintain multi-generational client relationships through retained control of assets upon a client's death or incapacitation
- Maintain control of investment management services
- Encourage the consolidation of client assets
- Eliminate the administrative burden and risk associated with in-sourcing trust services
- Build a deeper sense of independence and eliminate perceptions of self-dealing

BENEFITS FOR YOUR CLIENTS

Offering your clients corporate trust services provides all the benefits of a trust—provisions for beneficiaries, tax management, privacy, control, and protection from creditors and during incapacitation—with the convenience of having them delivered with their current investment manager.

Corporate Trustee Services
Administrative responsibilities including tax returns, record keeping, distributions, bill payment, as well as grantor and beneficiary communication

Personal Trust Administration
Administration of all forms of personal trusts whether created during life or as part of an estate or other financial plan

Estate Settlement
Full-spectrum estate administration services to ensure that each estate is executed and distributed in full alignment with the wishes of the client

Land Trusts
Recorded title to real estate situated in the State of Illinois is held by Trustee while all rights and conveniences of ownership are retained by the client

1031 Exchanges
Qualified Intermediary assists an individual exchange "like-kind" properties while deferring capital gains on a real estate sale

OUR FIRM

Offering your clients trust services through our trust company provides the best of both worlds: the service and attention expected from a small, boutique firm and the prowess and technical capabilities of a large national firm.

The services of a small boutique

- Dedicated Trust Administrator allows ease of access
- Diligent record management, custody services, and tax preparation
- Account administration services

The strength of a national firm

- Comprehensive, nationwide trust services with a local bank feel
- Highly experienced professionals—our Trust Administrators have an average of over 20 years of industry experience

WORKING WITH US

Utilizing an omnibus account through Bank of New York Mellon as our custodial agent, we retain custody of your client's securities while providing a smooth and seamless transition. A few highlights:

- Timely processing of income payments, interest, and dividends
- Identification of issues arising from corporate actions such as splits, calls, and maturities
- Notification of tender offers, merger elections, and other items requiring action
- Set-up and administration of trading accounts to execute settlement instructions for stocks, preferred securities, exchange-traded-funds, and bonds to allow continued trading on accounts
- Order entry on your behalf
- Provision for online access to ensure account information is easily monitored

Partnering with Wintrust brings convenience and simplicity to the complicated arena of trust services. As a locally-based firm, we pride ourselves on offering accessibility, personalized service, and an unparalleled level of attention. We ensure seamless trading and convenient online access to accounts. As your partner, we will work closely alongside you to help you develop business, and will provide continual education for client relationship managers and sales staff, always ensuring you are fully informed.

OUR HERITAGE

For nearly a generation, we have proudly been helping trust clients define and achieve their wealth transfer goals. Remaining true to the core tenets upon which our firm was founded, our professionals are committed to providing unparalleled client service and responsiveness. We understand that our clients deserve the comfort and confidence that only comes with knowing that their experienced Trust Administrator is always available. At Wintrust Wealth Management, you get the undivided attention of a knowledgeable, seasoned, and caring professional for the life of your trust.

Come see what our dedicated Trust Administrators can do for your clients. Come see what sets us apart.

WINTRUST®
WEALTH MANAGEMENT

INVESTMENTS • TRUST • ASSET MANAGEMENT

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