ESTATE SETTLEMENT SERVICES

WINTRUST
WEALTH MANAGEMENT

We bring technical expertise, financial capabilities, objectivity, and compassion to bear in managing the affairs of your estate.

The death of a loved one is one of life's most difficult experiences. We understand that settling an estate is a personal and complex process that can seem overwhelming. We work expeditiously, but at your family's pace.

The experienced Administrators in our Trust organization, The Chicago Trust Company, N.A., ensure that your estate is administered and distributed according to the terms of the will or trust in an efficient, professional, and impartial manner.

OUR APPROACH

Our Estate Settlement Service is provided in five phases:

1. Your estate settlement begins with a consultative meeting with you, your family, and your advisers. We identify assets, outstanding debt, existing estate plans, and your family's goals and immediate needs.
2. Next, we determine asset titling, collect assets, open probate if necessary, value all assets with the help of appraisal experts if needed, and raise necessary cash to pay taxes, debts, and expenses.
3. Then we prepare and file state and federal estate tax returns, and ensure all taxes owed are paid.
4. Next, we resolve any IRS audit or other outstanding issues that may exist and begin the final distribution process.
5. Lastly, we file final individual income tax returns and file fiduciary income tax returns on an annual basis.

OUR SERVICES

Throughout the settlement of your estate, we assume all responsibilities as estate Executor, including, but not limited to:

- Participating in court proceedings for proof of will, naming of executor or administrator, and proof of heirship
- Collecting and valuating of assets
- Preparing inventory and accounting for court approval
- Paying claims, expenses, taxes, spousal and children's awards
- Preparing and filing federal and state estate tax returns
- Providing custody and investment management of assets
- Collecting income and other receivables
- Protecting the interests of all heirs and beneficiaries
- Determining proper beneficiaries and distributing all property pursuant to the terms of the trust, will, and applicable laws
- Coordinating services of attorneys, accountants and other professionals as needed

CHOOSING AN EXECUTOR

You want an Executor with technical expertise, experience, and compassion. At Wintrust Wealth Management, our Trust organization offers personalized service from dedicated, highly-trained, and experienced estate Administrators. We maintain regular communication with you and your family, and advocate for your loved ones' needs with sensitivity and professionalism.

To learn how we can be there for you and your family, talk to a Trust Administrator with Wintrust Wealth Management.

wintrustwealth.com

WINTRUST®

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