

Popular Trust Services¹: Take control of your future.

When you choose Popular Trust Services¹, your trust is managed by professionals who not only have knowledge of – and are willing to – assume the fiduciary responsibility of managing a trust, but who also have your holistic wealth management goals in mind.

It starts with you and your goals

Your dedicated Private Banker remains your relationship manager, while an experienced Trust Advisor from Popular is assigned to provide trust administration services. As an extension of your team, your Trust Advisor helps to ensure expert, personalized and responsive trust administration around your unique priorities.

Why Popular Trust Services¹?



Nationwide Capabilities

We're able to provide trust administration services in all 50 states.



Security

Have peace of mind knowing that your assets are protected by a federally-chartered trust company and member of the FDIC.



Expert Experience

Our team of experts bring decades of experience working with individuals and families to achieve their goals.



Eliminate “Successor Trustee Risk”

Get rid of possible “successor trustee risk”—when another trustee manages the trust after the primary trustee dies or is unable to – choose Popular Trust Services as your corporate trustee.

Our Capabilities

We're proud to offer a wide range of trust services for the expected – and the unexpected. Clients can rely on us for services including:

- Estate and Retirement planning
- Estate liquidity analysis
- Review and financial analysis of trust documents and wills
- Advice on how to use trusts to minimize estate and gift taxes and achieve your long-term goals
- Family, private foundation and charitable gifting strategies
- Generation skipping transfers
- Business transition planning
- Estate, fiduciary and gift tax return preparation
- Internal Revenue Service and state examinations
- Estate administration
- Private foundation administration
- Business valuations
- Preparation of:
 - » Estate tax return – Form 706
 - » Trust income tax returns – Form 1041
 - » Gift tax returns – Form 709
 - » Private Foundation tax returns – Form 990
 - » Judiciary and Non-Judiciary Accountings

We look forward to an enriching relationship, sustained over generations.

popularprivateclient.com

See back for details.

popular.
— PRIVATE CLIENT

popular.
— PRIVATE CLIENT

1. Popular Trust Services is a Trust Representative Office of National Advisors Trust Company. Popular Trust Services is offered through Popular Bank. Popular Bank and National Advisors Trust Company are not affiliated. Trust and custodial services are made available through National Advisors Trust Company. Popular Bank and/or its subsidiaries and affiliates are not engaged in rendering legal, accounting or tax advice. If legal, accounting, or tax assistance is required, the services of a competent professional should be sought. Please consult with your accountant, attorney and/or tax advisor for specific guidance.

©2018 Popular Bank. Member FDIC.