Fiduciary Associates℠

Independent Trustee • Personal Representative
Trust Protector • Curator

We provide streamlined and cost-effective trust and estate administration services. We offer all the professional administrative services that a corporate trustee or law firm provides – without the bureaucracy, high cost, and delay often associated with large firms.

- Family Trust Administration
- Special Needs Trust Administration
- Estate Administration
- Life Care Management
- Property Management

Our Clients

SPECIAL NEEDS TRUSTS

As Trustee of a Special Needs Trust, we can provide the expertise necessary to administer the trust correctly in a cost-effective manner. More importantly, we partner with the family to provide hands-on compassionate and respectful care. We will be there for you when you need us, now and in the future.

SURVIVING SPOUSES

After the first spouse passes, the surviving spouse should review the successor trustee and personal representative named in estate planning documents. Often, there is no backup to the spouse or the successor named is no longer available. We offer a flexible, cost-effective alternative that allows the surviving spouse to take control of the future.

FAMILY BENEFICIARIES

Generational trusts usually allow for removal or resignation of trustees over time. Fiduciary Associates can be appointed as Independent Trustee when beneficiaries become unhappy with the service of a corporate trustee or would like to choose their own financial advisor. When we serve as an Independent Trustee, the beneficiaries enjoy more flexibility and control within the provisions of the trust.

What Makes Us Different?

Cost-Effective Collaboration

With a holistic, inclusive approach, we work to create a collaborative program to share information and solve problems in a timely, secure, and cost-effective manner.

Conflict-Free Service

We do not replace your other advisors – such as your attorney or CPA – and we do not sell financial products or services. We are part of the team protecting you and your family.

Fiduciary Standard of Care

As professionals, we practice a fiduciary standard of care 24/7. We act in your best interests at all times. You and your family ALWAYS come first.

Multi-Disciplinary Expertise

We have expertise in many areas. We can answer all of your questions or direct you to the right resource.

Our Management Team

Shelley Rhoads Perry

A seasoned Florida-licensed trust and estates attorney with extensive fiduciary planning and administrative experience

Linda O. Flores

A Florida-registered Professional Guardian with more than 25 years of experience in the banking sector

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www.trustnaples.com • 239 | 206-1203

Fiduciary Associates℠

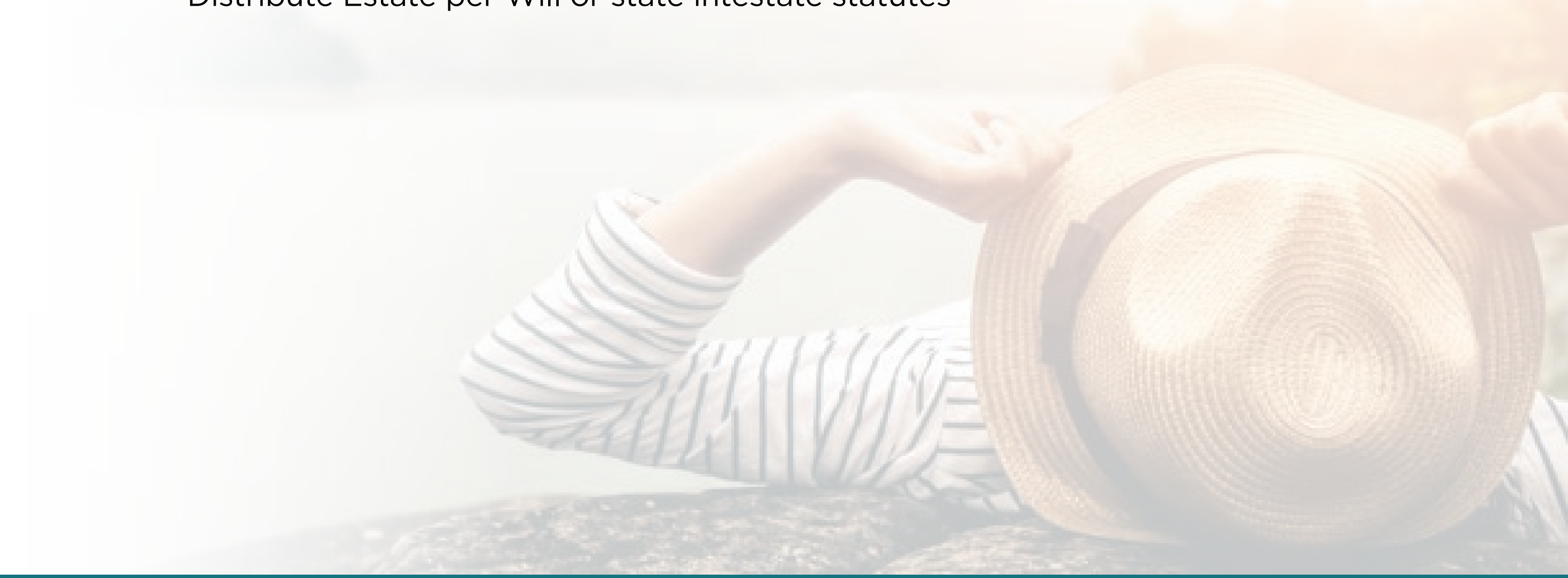
SERVICES

ONGOING INDEPENDENT TRUSTEE OR CO-TRUSTEE SERVICES:

- Review trust documents
- Provide unbiased administration based on the terms and intent of the grantor
- Manage alternative assets, including real estate, oil, gas, and mineral interest, and closely held business interests
- Review distribution requests
- Assist beneficiaries in preparing budgets as needed
- Calculate scheduled distribution amounts per trust
- Make distributions as required by trust document provisions
- Maintain strict audit and due diligence procedures
- Assist with annual tax return preparation and filing
- Report quarterly or annually to grantors and beneficiaries

ESTATE SETTLEMENT SERVICES:

- Review Executed Will and Codicils
- Identify and locate assets and beneficiaries
- Secure real property and financial accounts
- File Probate if necessary
- Pay known creditors if applicable
- Address any federal and/or state tax liabilities
- Determine distribution shares or amounts
- Report to beneficiaries as needed
- Distribute Estate per Will or state intestate statutes



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