

Ensuring a Lasting Legacy

At Tri-Star Trust Bank, we understand how important it is to protect everything that you've worked for, even after you're gone. That's why we offer a number of estate planning techniques that will help minimize your estate taxes, protect your heirs and ensure a lasting legacy. No matter your net worth, a good strategy is crucial to a smooth and successful transfer of your estate. Our team is here to help you develop your plan and avoid probate by ensuring your assets are distributed to your chosen people and charities in the manner you desire.

What You Can Expect from Our Estate Planning Services:

- A thorough inventory of your assets, investments, retirement savings, insurance policies, and real estate or business interests, so each is accounted for in your plan.
- Development of a strategy that will ensure your wealth is distributed according to your wishes, and that includes tools and techniques that make sense for you.
- An estate plan that works to reduce the impact of estate and income taxes, keeping your heirs protected.
- Charitable gift planning that ensures your estate plan supports the organizations that are important to you.
- Personal service and collaboration from our team of finance experts.

A Richer Future, Just a Phone Call Away

Let us help you secure the future of your estate and protect your assets and heirs. Give us a call, or visit www.tristartrust.com for more information.

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