

Synopsis of Corporate Trustee Services



Capacity

- Trustee/Successor Trustee
- Personal Representative
- Conservator
- Investment Advisor
- IRA Investment Advisor



Range of Services

- Ongoing Personal Client Contact
- Investment Management/Asset Allocation
- Manage Real and Personal Property
- Management of Real Estate Assets
- Distributions to Beneficiaries
- Discretionary Distributions
- Record Keeping
- Tax reporting and filing
- Bill Paying
- Account Reconciliation
- Manage all Medical Aspects Including: Insurance, Appointments, Prescriptions, Caregivers
- Personal errands
- Funeral Arrangements

Oregon Pacific Bank Trust Services offers products that are not insured by the FDIC, are not deposits, and may lose value.