Wye Trust
16 N Washington Street
Easton, MD 21601
Office 410.763.8543
info@wyefinancial.com
www.wyetrust.com

A Menu of Services

One of the great strengths of trust planning is the ability to tailor the plan to respond flexibly to current and future family financial needs. We emphasize personalized financial management.

Portfolio supervision
Our investment advisory and investment management services put experienced investment professionals on your side. The officer assigned to your account will work with you to establish an investment strategy suited to your personal goals and circumstances.

Lifetime financial management
The next step in comprehensive financial protection employs a revocable living trust. We begin by developing an investment policy for the trust, based upon your requirements. We will implement that plan, providing continuous portfolio supervision, reinvesting or distributing trust income as directed. As trustee, we can move beyond the investment sphere, arranging to pay household bills and taxes on your behalf. A revocable trust provides financial protection in the event of incapacity, and has valuable estate planning aspects as well.

Charitable trusts
Thoughtfully designed trusts can provide financial protection for you or for family members as well as substantial support for your favored charity. Significant tax benefits may be available as well.

IRA rollovers
People who receive lump sums from company retirement plans can choose to pay income tax immediately or execute a tax-deferred rollover. With their tax-deferred nature, IRA rollovers present somewhat unusual investment issues, which need to be addressed in the context of a full review of financial resources.

Estate settlement
Whether your estate will be large or small, you should not put this task into inexperienced hands. Your will can designate us to handle this critical responsibility. By doing so, you assure your family that your estate will be settled efficiently, economically and fairly.

Marital and family trusts
When a legacy for a spouse, child or other family member is left in trust, the heir receives a double benefit—our professional investment management, supervision, in addition to the financial resources represented by the trust assets. With careful management, the flexible protection afforded by the trust can last a lifetime.