



Trust Services

What is a Trust?

A trust is a legal method for placing funds, personal property, and other assets in the control of a trustee for the benefit of an individual. Trusts are used to: manage large assets, avoid the expenses of probate, avoid conservatorships, and provide for ongoing financial management if the trust creator becomes incapacitated. The trust can designate one or more persons, an organization, or a bank to act as trustee. A trust can be used for paying bills, managing investments and real estate, and the general protection of a person's estate. First Fiduciary Corporation (FFC) specializes in many types of trusts including Testamentary, Living, Revocable, Irrevocable, Family, Marital, Minors', Supplemental Needs, and Special Needs Trusts. FFC will also serve as a standby or successor trustee.

Why First Fiduciary Corporation as Trustee?

First Fiduciary Corporation, founded in 1969, was the first independent fiduciary in Minnesota. With nearly 50 years of experience, we have built a reputation as a trusted leader in the field of fiduciary management. We handle complex cases and difficult family situations. Our employees are held to the highest ethical and professional standards, and are some of the most highly trained and experienced professionals working today. While certification is not required under state law, our staff is required to become National Certified Guardians after their first year of employment. We are leaders in all facets of guardianship and conservatorship and have forged long-term relationships within the legal and social services community.



ABOUT US:

Facts:

- Minnesota's First Independent Fiduciary, Established in 1969
- Staff Certified as Certified Estate and Trust Specialists (CES)

Memberships:

- Minnesota Association for Guardianship & Conservatorship (MAGIC)
- National Guardianship Association (NGA)
- Institute of Business and Finance (IBF)

LOCATIONS:

ST. PAUL (Main)

4120 Lexington Way
Eagan, MN 55123
(651) 452-1512

MINNEAPOLIS (By Appt. Only)

3517 W. 50th Street
Minneapolis, MN 55410
(612) 332-1969

www.FFCorp.com



Each client is assigned a Trust Manager who will work diligently to balance your long term financial goals with your current needs while maximizing the value and longevity of your trust funds.

First Fiduciary Corporation does not hold financial assets in-house. As your trust company, we are obligated to take care of your assets, held at a bank or investment company, on your behalf. We will keep current investment management relationships in place when appropriate – something banks and most trust companies do not allow. First Fiduciary Corporation will work closely with your investment team to optimize the value and investment potential for your assets. Our fee is based on time spent administering the trust; generally we do not bill based on a percentage of the value of the trust. Our internal trust management includes multiple levels of checks and balances. Clients are provided with an annual account that details every transaction. Accounting reports can be provided more frequently upon request. In addition, there will be a secondary professional assigned to each client/trust and after business hours emergency support.

We work with the following types of trusts:

- Revocable Trust
- Irrevocable Trusts
- Maritable Trusts
- Testamentary Trusts
- Living Trusts
- Family Trusts
- Minors' Trusts
- Supplemental Trusts
- Special Needs Trusts

First Fiduciary Corporation strives to understand your intent and wishes. FFC works to ensure beneficiaries receive the trust assets according to your wishes in the timeliest manner possible. First Fiduciary Corporation has the history and stability needed in the long term to serve in a standby or successor capacity on any trust. We have been serving clients for nearly 50 years, and look forward to serving clients for many decades to come.

Supplemental and Special Needs Trusts

Our Trust Manager works closely with our client, family members, and interested parties in a supportive system. Trust Managers also ensure the trust is administered properly to protect government benefits. Trust Managers work directly with our clients and are able to aid in coordinating appropriate services that best enhance health, welfare, and safety for our client. Many banks and trust companies are not able to offer the individualized care management we offer. Our staff are educated and trained in disciplines such as social work and human services. Our on-going professional education and training allow us to provide care for clients beyond financial management.

Please call us at (651) 452-1512 for more information or to set up a meeting to discuss your needs.



Minnesota's
**First
Fiduciary**