



The Power of Trusts and a Professional Trustee

Protection

Protect beneficiaries from the influence of others, in the case of a divorce, preserve government benefits, in the case of mental illness/substance abuse

Control

With the ability to control the disposition of assets over a longer period of time—e.g., blended families or carrying out charitable intent—control can be retained after the grantor has passed away.

Management

Gain access to financial expertise and planning for succession in the case of illness, incapacity, or death. Avoidance of probate, so faster transition post-death to allow for payment of expenses and handling of assets.

Tax Planning

Current Estate/Gift Tax rules sunset in 2025, so the establishment and funding of a trust could take advantage of the current amounts. Setting up a Tennessee-situated trust could also save on income tax.

Asset Protection

Asset protection trusts are permissible in Tennessee. Our charter allows us to offer and administer these.

Professional Trustee Benefits

Trust administration knowledge and skills, independence, appointing an institution with multiple professionals versus one person with a life expectancy, ability to remove family members from having to oversee and make decisions concerning distributions.

Advocacy Trust offers access to trust professionals who provide an unmatched level of trust service in an efficient and professional manner. We view asset management and trust administration as separate functions. Because we are focused solely on providing excellent trust services, we work with outside investment advisors who are focused on providing premier investment management advice.



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