Advocacy Trust is 100% dedicated to serving you.

Whether you are a family, an individual, an attorney, a CPA/financial planner, or an advisor, Advocacy Trust is ready to be your advocate. Our company is made up of professionals with decades of trust industry experience and is well known for the caring support provided to individuals who have dealt with adversity and financial challenges. Unlike most retail trust companies, our team has worked on thousands of complex trust cases impacting a host of client situations. Our team handles numerous financial issues confronting trust clients (legal, settlement, private/public benefits, medical set-aside, etc.)

MISSION STATEMENT

To improve the lives of our clients and their families by providing a positive experience through professional investment management, trust services, financial planning, and other support that effectively addresses their unique needs.

Families & Individuals

AS YOUR ADVOCATE, we partner with you to assist in carrying out your planning goals for every stage of your life. With our unique model, we remove any fear of losing control of your trust assets, while bringing calm and reason to the chaotic nature surrounding any large settlement. Our platform allows us to offer our fiduciary services in an impartial manner, with a focus on meeting the objectives outlined within your trust agreement. Specifically, our services include:

- Dedicated relationship managers
- Collaborative, needs-based financial planning
- Advice surrounding complex family situations and challenging financial transactions
- Decisions on private insurance versus public benefits
- Guidance on trust terms and conditions (trust protector role)

Our extensive personalized support is designed to help meet your planning objectives for today and through tomorrow.

Attorneys

AS YOUR ADVOCATE, we have your client's best interest at heart. We are prepared to operate as a conservator if it helps in expediting the settlement of the case. In addition, we do not default to a restrictive special needs trust and public benefits unless it is warranted. We also provide you a level of due diligence associated with your plaintiff's settlement to make sure it is "Grillo Compliant." Through our affiliated resources, we assist in:

- Assessing the appropriateness of the offer to the plaintiff
- Understanding its impact on the client's financial plan; and
- Ensuring settlement offers are appropriately explained to your client and documented

Although we do not offer legal advice, we leverage various trust attorneys in drafting client trust documents. We also offer feedback on trust documents for a variety of trust planning situations. In addition, we regularly refer business to attorneys with whom we have an active relationship.

CPAs & Financial Planners

AS YOUR ADVOCATE, we offer your clients access to trust professionals who provide an unmatched level of trust service in an efficient and professional manner. We avoid conflict with your respective services, as we do not seek to interfere with your client relationship and your existing support model. Instead, our independent role as a managed trust solution creates a complementary support relationship for your client, as well as an expanded level of account retention and customer loyalty for you.

Advisors

AS YOUR ADVOCATE, we do not offer investment management services, so there is no conflict with the support provided by our trust professionals. As such, we view asset management and trust administration to be 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 to our underlying client. In addition, our independent role as a managed trust solution creates a complementary support relationship for your client, as well as an expanded level of account retention and customer loyalty for you.

What makes Advocacy Trust different?

Advocacy Trust is unique from other trust companies. It has built a holistic platform that provides traditional trust clients as well as plaintiff attorneys and their clients with the attention and guidance required to navigate the complexities surrounding their individual financial situation. Our extensive personalized support is designed to help meet your planning objectives for today and through tomorrow.

The superior level of service we provide is difficult to find anywhere within the financial services industry today.

Helping People

Focused on people whose lives have been disrupted by an unexpected or catastrophic event.

Advice Driven

Providing individuals advice regarding their financial needs, instead of just pushing a product sale.

Simplifying the Complex

Navigating the complex rules surrounding government assistance, eligibility requirements and other challenging financial topics.

Balancing Private vs. Public Benefits

Assessing the impact of private insurance versus the public benefit restrictions on a trust.

Over the Top Support

Recognizing that the needs of families and individuals extend well beyond what any single financial product can offer.

First-class trust offerings include:

- Special Needs and Structured Settlement Support
- Estate and Legacy Planning
- Administration and Custodial Services
- Philanthropy and Charitable Giving
- Asset Protection Trusts

ADVOCACY® TRUST

Looking Out for Your Interest
Supervising all aspects of a trust, acting at all times as a fiduciary and in your best interests.

Line of Defense
Offering a line of defense against undue influences from existing friends or family, outsider caregivers, and new friends who may suddenly appear once a trust is funded.

Reasonableness Test
Abiding by the terms of the trust and reviewing each distribution against a standard of "reasonableness."

Quality Recordkeeping
Taking custody of cash, maintaining transactional records, preparing tax letters and returns, issuing account statements, and providing detailed accountings as required by a court or other representative authority.

Unique Service Support
Determining if it is necessary to purchase a vehicle or house, identifying your specific needs, as well as coordinating the purchase, if needed.

Thoughtful Trust Administration
Coordinating the payment of bills and expenses, and taking charge to follow through on implementing the services outlined in the terms of the trust or care plan.

Cost Consciousness
Maintaining relationships with other service providers in an effort to contain costs, including public benefit agencies and medical cost containment companies.

Coordinating Care Giving
Coordinating payroll for caregivers, if such services are not provided by a private agency or Medicaid.

Professional Investment Oversight
Identifying independent investment management resources, including monitoring and reviewing their performance and making changes that are in your best interest.

Seeking the Highest Level of Care
Supporting the recommendations made to enable you to receive the highest level and quality of care.

ABOUT ADVOCACY TRUST

Advocacy Trust is a Tennessee chartered trust company with the ability to perform services in most states across the country. With over $1.5B in assets under administration, we are committed to improving the lives of our clients, their families, and their caregivers through investments, trusts, tax, and other related fiduciary and administrative services.

Call our trust team today at 855-879-3436 to learn more about what Advocacy Trust can do for you.

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