

# Hello! We're Midland.

Midland Trust Company (MTC) is a full-service trust company offering estate planning advice and administration, as well as customized trust management. Our team of nearly 50 accomplished, credentialed professionals are committed to providing prompt and personal service. With primary business offices in Chicago and New York, we serve clients and attorneys across the country.

## Trust Services

We offer customized trust management for individuals, families, institutions, foundations and endowments.

### We can act as administrator.

While many people appoint a family member or friend to administer their trust or estate, it may not be in their best interest, mainly due to lack of experience.

We will support your trust and estate needs and handle every detail, alleviating the burden from your loved ones. While we don't take the place of your attorney or accountant, we can act as a trusted member of your team of advisors.

**By designating Midland to serve as your corporate trustee, you'll benefit from a wide range of trust services, including:**



Distribution of trust funds in accordance with your wishes



Protection of confidential information



Preparation of tax-related documents

### Examples of trusts under administration:

- Revocable living trusts
- Family and marital trusts
- Irrevocable trusts
- Charitable remainder trusts and foundations
- Guardianship
- Special Needs and Settlement Protection trusts

## Estate Services

We offer experienced estate planning advice and administration.

When you appoint Midland to be your executor or personal representative, a professional team of specialists will apply skill, sensitivity and discretion in helping you plan for the disposition of your assets and the settlement of your estate through the following services:

Probate your will



Collect assets and information



Determine debts and claims against the estate



Analyze and resolve time-consuming and complex tax issues



Manage all elements of the estate, including investments



Determine and arrange payment of all taxes



Distribute the estate



Midland Trust advocates for trust beneficiaries and their families with empathy and respect and is experienced in finding solutions for unique circumstances. Our mutual clients often have a team of experts working on their behalf – accountants, advisors, attorneys. We value every relationship and work as a team with the same goal in mind – to provide the optimal solution for the client.

We remain committed and dedicated to providing superior service and ensuring client needs are met. You'll find reassurance that your client is cared for throughout the process.

## Guardianships & Special Needs Trusts

**We can act as guardian/conservator of the estate.**



Midland Trust Company administers court-ordered guardianships/conservatorships for minors or disabled adults to preserve and protect a ward's assets.

### Some examples include:

- Minors or disabled adults receiving proceeds from a personal injury or wrongful death lawsuit
- Minors receiving an inheritance as a result of their parents' untimely death
- Adults judged as unable to handle their financial affairs

**We can act as administrator of special needs trusts.**



A disabled individual often needs to protect their current or future public benefits. In fact, assets over a certain limit can actually disqualify their benefits. The solution? Establishing a special needs or supplemental needs trust. It provides a safe harbor for the disabled individual's assets. That way, assets aren't counted when determining eligibility for public benefit programs.

Assets in special needs trusts can be used to pay for needs that government programs don't cover and help improve your loved one's quality of life. The trust can make funds available for special therapies, procedures and equipment, as well as for education, training and other items to make your loved one's life more comfortable.

**We serve in a fiduciary capacity, serving in the best interest of the client and their beneficiaries.**

- As a fiduciary, we put your interests first, act in utmost good faith at all times, and provide full and fair disclosures.
- The fiduciary standard is the highest level of customer care.
- We adhere to these core principles at all times, which serves as the cornerstone of our reputation and client service commitment to you.

## Best Practices

**Choose our services to gain the following advantages:**

- Expertise & Dedication
- Compassion & Understanding
- Personalized Service
- Peace of Mind
- Cost Savings

Midland Trust Company delivers value and service through experience, objectivity and compassion.

## Learn More

- Visit us at [midlandtc.com](http://midlandtc.com)
- Follow us on LinkedIn [linkedin.com/company/midland-trust-company](https://www.linkedin.com/company/midland-trust-company)