

Hilliard Lyons Trust

A Baird Company

Make the Road Ahead a Little Smoother for Your Loved Ones

Effective estate planning allows you to maintain your current lifestyle while transferring your wealth to the next generation or charity. Careful planning allows you to minimize the impact of taxes on your estate and can also protect your assets from unexpected health, personal and business risks.

When you have a substantial amount of wealth, transferring your assets to your loved ones can be complicated. You need a wealth transfer plan that takes into account the hopes and dreams you have for your family, any special needs they may have, your philanthropic goals, and the amount of money you need to retain for your own purposes.

Hilliard Lyons Trust can help you sort through the myriad of wealth transfer strategies that can help you maximize the value of your estate, and achieve your desired goals.

An Overview of Hilliard Lyons Trust

- Hilliard Lyons Trust provides asset management, wealth transfer planning, estate settlement, and trust services to high-net-worth clients
- Hilliard Lyons Trust is one of the largest state chartered trust companies in the Commonwealth of Kentucky with over \$10 billion in assets and offices in Louisville, KY; Cincinnati, OH; and Evansville, IN
- Hilliard Lyons Trust is staffed by a multi-disciplinary team of over 60 professionals. They include trust and estate administrators and investment professionals
- Our professionals have an average of 24 years of industry experience, and 15 years with Hilliard Lyons Trust

Hilliard Lyons Trust Services

Hilliard Lyons Trust provides asset management, trust administration and estate settlement services for a wide array of high-net-worth clients and institutions. Our services include:

INVESTMENT SERVICES	TRUST ADMINISTRATION	ESTATE SETTLEMENT
<ul style="list-style-type: none">• Assess client needs• Assist in preparing the Investment Policy Statement• Structure portfolio asset allocation based on risk profile of the client• Monitor and review client portfolios	<ul style="list-style-type: none">• Administer trusts according to the terms of the document• Collaborate with clients' income tax and estate planning advisors• Suggest and implement gifting strategies• Manage IRA distribution requirements• Provide bill payment services	<ul style="list-style-type: none">• Management of estate assets• Interpretation of terms of wills, codicils and trusts• Work with legal advisors, trustees, CPAs, etc. to determine the full extent and value of the estate• Estate distribution

Contact Hilliard Lyons Trust Today

To obtain additional information about trust administration, planning or estate settlement services, contact Hilliard Lyons Trust or your Financial Advisor today. Our professionals will work closely with you to meet your estate and wealth transfer planning needs.

Hilliard Lyons Trust, a Baird Company

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