Truepoint Private Trust & Fiduciary Services

Wealth management is more than managing portfolios. It's a holistic approach to help clients achieve their unique goals and reinforce family values.

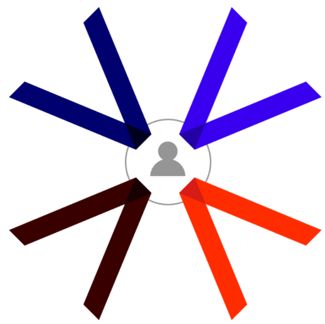
Our Core Services

Four distinct specialities. One customized life plan.

Whether you need specific trust or estate assistance or prefer a fully integrated suite of services, Truepoint will help simplify your life.

Estate Planning: Customized estate plans that handle the many important details

Investment Management: An evidence-based approach with tax-efficient, low-cost portfolios



Financial Planning: A goal-focused plan, tailored for you

Tax Planning: Year-round tax counsel, including tax return preparation and filing

What's New

Our team with deep resources and experience was built specifically to seamlessly connect every aspect of your financial life.

When considering the time, complexity and emotions associated with the role of an executor, trustee and/or financial power of attorney, many families choose not to burden family members or friends. Some may have complex needs that prompt them to seek professional services. Given our unique client relationship and knowledge, many families appoint Truepoint in these roles to handle various aspects of trust administration.

Truepoint Private Trust: Providing corporate executor and trustee services to our family clients

Truepoint Fiduciary Services: Our ongoing support services to those in executor and trustee roles

Expanded Services: Including philanthropic support services, family meeting facilitation, and next generation financial development

Getting Started

Want to learn more about these services to better understand if we can help you?
It starts with a conversation. Contact your Truepoint advisor to get started.

Additional fees for private trust and fiduciary services will apply with a minimum annual fee of $2,500 for these services. Full fee schedule can be provided upon request.