Fiduciary Partnerships

Navigating the Complexities of Custody & Investments

With 20+ years of experience in working with professional fiduciaries (trustees, guardians and conservators), we have developed a unique understanding of the complexity of your business and clients' needs. Individual and professional fiduciaries can partner with HoyleCohen to manage investment and operational aspects of financial accounts, thus easing the burden on yourself or your staff and ensuring customized and personalized services. Take a look at the services we offer.

Account Management.

Reducing the legwork of marshaling client assets by working with you to consolidate accounts with and between custodians into one place, thereby **simplifying reporting and cash analysis for each client**. Establishing restricted accounts with custodians as needed to **reduce bonding and other fees**. Processing distributions from non-restricted accounts and coordinating court authorizations with custodian to process distributions from restricted accounts. Handling approved account divisions to beneficiaries and other paperwork.

Investment Management.

Providing fiduciary-level, **customized portfolio management** on a scalable platform suitable for assignments of all sizes that can accommodate tax management and cash flow needs.

Value-added Services.

Offering court ready investment plans, which can include **sustainability and cash flow analysis**, customized quarterly/annual reporting, and **Principal & Interest (P&I) year-end reporting** if desired. Additionally, unlimited in-court assistance with explanation of relevant investments and plans is available. Comprehensive review and analysis of non-standard assets (existing annuities, limited partnerships, etc), structured settlements, qualified and non-qualified retirement plans, QDROs, and division of assets. When authorized, can provide and prepare required paperwork to facilitate transactions in many non-standard assets.

Who We Serve.

Professional Fiduciary Companies
Court Appointed Conservators
Elder, Family & Estate Attorneys
Individuals & Family Representatives

Where Wealth Meets Experience.

Over $3 Billion in managed assets.

Exceptional Investment Committee.

Highly credentialed, industry recognized teams.

Specialized planning and customized strategies.

The HoyleCohen Difference.

Our experience helps us navigate many would-be bottlenecks before they become a problem. We know which questions to ask and how to connect with the right answer. Take a look at what our fiduciary partnership means to our clients.

True Partnership.

We act as your **partner, not your competitor**. Our fees come from the assets we manage, not from your fees. Additionally, as your partner, our value-added services help create leverage within your organization, providing you the flexibility to take on more cases more efficiently.

Premier Firm Advantages.

Our partners can **capitalize on the strength of our institutional relationships**, equating to dedicated service teams at our custodians who know us and are readily available for easier onboarding of assets and potentially significantly **reduced fees**.

Service Oriented Operations Team.

Our teams provide high levels of service and follow through. They know who to call to get the answers needed and how to speak the language of banks, brokerage firms, and fiduciaries.

Professional Fiduciary Difference.

Just as you have a legal obligation to act in the best interest of your client, so do we. When HoyleCohen is engaged, we serve in a fiduciary capacity which means that we have a legal responsibility to act in the best interest of both you and your underlying client. No employee at our firm is compensated based on the recommendations they make or the trades they execute. **Not today. Not ever**.

Vision. Choices. Flexibility. A Business Built Around You.

Explore your options, visit hoylecohen.com

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