



# BOOMERS and BEYOND...



## Solutions and Services

**Garden State Trust Company** brings years of experience to estate settlement and administering to many types of trusts and investment agency accounts including IRA rollovers.

Trusts are legal documents customized to take care of personal financial needs or goals. These vary from estate tax savings, to gifting to your favorite charity, to making sure family members are financially secure.

Trust planning also addresses family issues, such as divorce, remarriage and special needs heirs requiring special provisions. Serving as the executor to settle an estate can be a complicated, time consuming, and oftentimes frustrating process.

We appreciate the opportunity to serve you and your family as trustee or executor in either a sole, co-trustee or co-executor capacity. The professionals at **Garden State Trust Company** provide specialized expertise, experience, and integrated services to assist you in administering and managing the wealth you created during your working years. Our services for boomers and beyond are specifically designed for your later retirement years providing you with the freedom to enjoy this time in your life as you had planned.

During your later retirement years, if you find your financial and health care needs—or those of a loved one—are becoming too cumbersome for you to manage independently, the professionals at **Garden State Trust Company** can partner with you to alleviate some of the burden by providing the following services:

### Trustee Services

- Revocable Trust
- Stand-by Revocable Trust
- Irrevocable Living Trust
- Special Needs Trust
- Asset Protection Trust
- Charitable Remainder Trust
- Trust Under Will

### Investment Services

- Investment Management
- Investment Advisory
- IRA-Rollovers

### Estate Services

- Executor
- Agent for Executor

### Review Estate Plan

- Last Will and Testament
- Trust Documents
- Gifting Strategies
- Power of Attorney
- Living Will

### Lifestyle Management

- Arrange and monitor In-home care services
- Arrange for Medical Reimbursement services
- Arrange for Independent or Assisted Living alternatives
- Arrange for Long Term Care Insurance
- Concierge Services



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