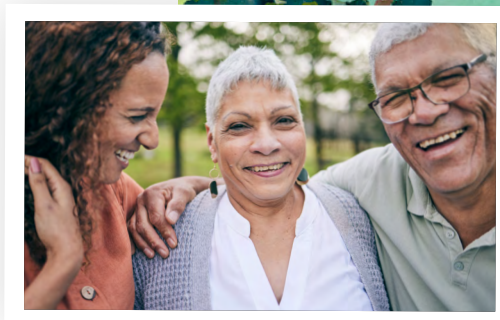


Give your clients a fiduciary *and* a support system.

When faced with planning for the future, some families may determine they require assistance that extends well beyond the typical fiduciary relationship. Regardless of age-related concerns, medical needs, financial vulnerability, or other unique circumstances, our team has the flexibility and dedication to provide high-touch administration assistance to those needing extra care.



DISTINCTIVE CARE SERVICES

Trust administration with extra support.

Our trust administration team is comprised of sensitive, caring professionals who have an exceptional ability to work with critical and complex situations specific to each individual or family.

Cumberland Trust's Distinctive Care Services provide care over and above that of Personal Trust Administration.

Additionally, we offer an enhanced tier of Distinctive Care Services for clients needing even more support, providing personalized one-time or ongoing resources. This expanded level of service assists our clients as they navigate complex issues, often saving them time, money, and confusion. Our goal is to provide clients with resources and education so they will feel confident when making choices about their care.



Cumberland Trust customizes our Distinctive Care Services to the needs of each client. We often assist in coordinating services related to:

PERSONAL FINANCE SUPPORT

- Bill Pay
- Budget Planning & Management
- Caregiver Payroll
- Elder Financial Abuse Prevention

HEALTHCARE SERVICES SUPPORT

- Long-Term Care Insurance
- Medicare
- Care Management

RESIDENTIAL SUPPORT

- Home Maintenance
- Moving Residences
- Senior Living Communities
- In-Home Care

Why work with Cumberland Trust?

Provide a Collaborative Support System

Deliver a trustee solution that provides personalized trust and estate administration, and compassionate, hands-on service, guidance, and support for individuals and families.

Tailor Your Client's Experience

No need to settle for a one-size-fits-all approach to trust and estate administration. Serve your clients and their families with a unique approach based on their specific needs.

Attentive & Personalized Service

Every client works with a dedicated trust officer who is responsive, compassionate, and an industry expert. The families you serve receive the utmost care and professionalism.

Independent Administration

Our directed trust model separates asset management from trust administration, providing ultimate collaboration and unbiased services.

Low Client-to-Officer Ratio

With significantly fewer clients per administrator than the industry average, we can offer extremely responsive and personalized service.

Specialized Knowledge

We are passionate and highly experienced in navigating the intricacies of modern family dynamics, illiquid assets, and unique trust and estate circumstances.

HOW IT WORKS



We meet.

Let us know about the needs of the families you serve and the challenges you're looking to solve.



We plan.

Our team will work with you and the families you serve to develop plans to achieve their goals and protect their futures.



We move forward.

Take the next step confident in the knowledge that your client's trust is expertly administered with care and due diligence.

Find out how Distinctive Care Services can help families make the most of their trust assets.

