

MTC

THE ALTERNATIVE TO A TYPICAL TRUST COMPANY

	TYPICAL TRUST COMPANY		
ATTAINABLE MINIMUM	✗	✓	Our attainable minimum trust account requirement make us the ideal corporate trustee option for average American families.
SENIOR PROTECTION	✗	✓	We serve as Attorney in Fact under a Financial Power of Attorney to protect seniors from financial abuse.
SPECIAL NEEDS TRUST EXPERTISE	✗	✓	While many trust companies are moving away from taking on special needs trusts, we have built niche expertise & a suite of services in this area.
FLEXIRA™	✗	✓	We can incorporate your client's retirement account into a comprehensive estate plan.
MAIN STREET VALUES	✗	✓	Your clients will enjoy peace of mind, knowing their corporate trustee shares the same community and member-centric values of their local credit union.
DEDICATED TRUST OFFICER	✗	✓	Our goal is to build relationships and provide personalized service, so we designate an MTC trust officer to each client.
IN-HOUSE INVESTMENT TEAM	✗	✓	Forbes and Morningstar have recognized our in-house investment team for its tax-sensitive strategies that manage both risk and return.
TRANSPARENCY	✗	✓	We are committed to the fair representation and full disclosure of investment performance, as evidenced by our claim of compliance with GIPS® standards.
COMPELLING EDUCATIONAL CONTENT	✗	✓	Estate planning is complicated; we specialize in creating multimedia content that you can leverage to delight and educate your clients.