

CORPORATE TRUSTEE SERVICES

HOW BOSTON PRIVATE CAN MAKE A DIFFERENCE FOR YOU.

Today, wealth is being created by an extraordinary variety of men and women who each have individual priorities and goals. These busy people and their families are our clients, and no area of their financial lives is more important and personal than trusts.

THE BENEFITS OF BOSTON PRIVATE'S CORPORATE TRUSTEE SERVICES

Whether your estate plan includes a personal (living) trust, an irrevocable trust, a trust created by your will, or perhaps a special needs trust, appointing Boston Private as the corporate trustee ensures that your assets will be managed by experts who are experienced and skilled in helping a grantor and the trust beneficiaries navigate the many legal and tax issues that may have an impact upon the transfer and preservation of assets.

By appointing a corporate trustee, you can be assured that you will have objective and professional administration of your trust or estate, now and for generations to come. As trustee, Boston Private will provide you with oversight and management of key aspects of wealth administration, including:

- **Wealth preservation**—providing professional investment management, including personalized strategy, research, and implementation for the term of your trust.
- **Asset protection**—overseeing the safekeeping of your assets to avoid costly errors and manage legal issues or claims, either of which could have an adverse impact on your beneficiaries.
- **Accurate and dependable recordkeeping**—reporting on cost basis, capital gains, dividend and interest income, and rental income, and providing financial data to beneficiaries to facilitate timely preparation of trust tax returns and tax payments.

- **Continuity**—appointing a family member as a trustee may prove problematic should he or she have a conflict, resign, or become unable to manage the trust. A corporate trustee ensures continuity of trust and estate management for generations.
- **Beneficiary communication**—providing unbiased and objective consultation and guidance to family members and beneficiaries within the framework of the terms of the trust.

AN UNWAVERING COMMITMENT TO SERVICE

Since day one, Boston Private has been deeply committed to providing the highest standard of client service and building lasting relationships based on trust and confidentiality. Through careful analysis and a comprehensive understanding of your unique circumstances, we provide highly personalized trust services with customized investment portfolios and wealth management strategies.

A TEAM YOU CAN COUNT ON

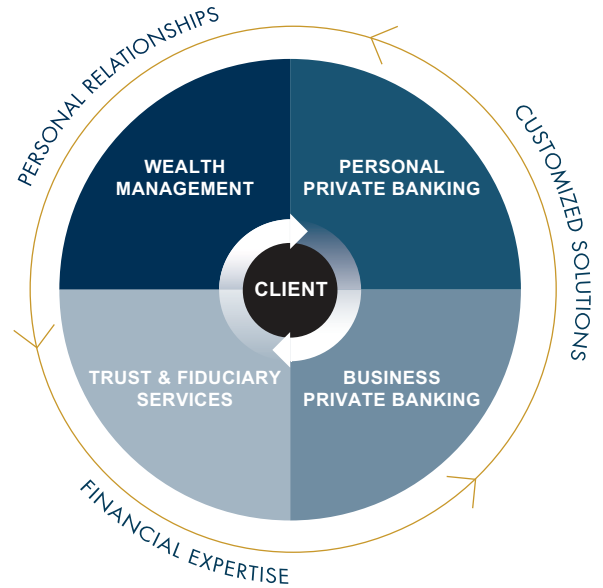
At Boston Private, we have an exceptionally knowledgeable team of trust experts. Each team member has his or her own area of specialization and the depth and expertise necessary to handle any administration issues that may arise. You and your beneficiaries can depend upon Boston Private as your corporate trustee to always be available and able to provide the expertise you need.

ABOUT BOSTON PRIVATE

Boston Private is a leading wealth management, trust, and private banking company with a national presence. Headquartered in Boston, we serve clients from our offices located in the major markets of Boston, San Francisco, San Jose, Los Angeles and Palm Beach.

We're committed to building a trusted relationship with each client and have the broad expertise to create comprehensive, custom solutions for their personal and business needs that are often interconnected.

As wealth creators, our clients value having one trusted resource that can help them address all of their wealth management, trust, and private banking needs.



MASSACHUSETTS

57 Enon Street
Beverly, MA

1 Federal Street**
Boston, MA

10 Post Office Square
Boston, MA

500 Boylston Street
Boston, MA

800 Boylston Street
Boston, MA

157 Seaport Blvd.
Boston, MA

1295A Beacon Street
Brookline, MA

265 Main Street
Cambridge, MA

7 Central Street
Hingham, MA

401c Centre Street*
Jamaica Plain, MA

1666 Massachusetts Avenue
Lexington, MA

1223 Centre Street
Newton, MA

336 Washington Street
Wellesley, MA

CALIFORNIA

225 North Beverly Drive
Beverly Hills, CA

9465 Wilshire Blvd.**
Beverly Hills, CA

1440 Chapin Avenue
Burlingame, CA

16000 Ventura Blvd.
Encino, CA

345 S. San Antonio Road
Los Altos, CA

420 Cowper Street
Palo Alto, CA

345 East Colorado Blvd.
Pasadena, CA

433 California Street
San Francisco, CA

60 South Market
San Jose, CA

160 Bovet Road
San Mateo, CA

520 Broadway
Santa Monica, CA

971 South Westlake Blvd.
Westlake Village, CA

FLORIDA

121 Alhambra Plaza, Suite 1202**
Coral Gables, FL

11376 N. Jog Road, Suite 101**
Palm Beach Gardens, FL

333 Sunset Avenue, Suite 209**
Palm Beach, FL

OREGON

201 B Avenue, Suite 290**
Lake Oswego, OR 97034

WISCONSIN

5201 East Terrace Drive, Suite 380**
Madison, WI

*Only Residential Lending services are offered.
**Only Wealth Management services are offered

BOSTON PRIVATE

WEALTH ▫ TRUST ▫ PRIVATE BANKING

0001520170515

Private Banking and Trust services are offered through Boston Private Bank & Trust Company, a Massachusetts Chartered Trust Company. Wealth Management services are offered through Boston Private Wealth LLC, an SEC Registered Investment Adviser and wholly owned subsidiary of Boston Private Bank & Trust Company.



Investments are Not FDIC Insured, Not Guaranteed and May Lose Value.

