# HELPING YOU FIND PEACE OF MIND

BCT WEALTH ADVISORS

## FINANCIAL WELLNESS FOR YOU AND YOUR FAMILY

As a leader, you are laser-focused on the success of your business. What about your personal financial success and that of your family? BCT Wealth Advisors has over 70 years of partnering with individuals and families to establish and maintain a clear financial plan for your financial success and that of your family.

BCT Wealth Advisors will help you with practical solutions, such as how to persuade your loved ones to discuss financial issues with you. What about ensuring your essential documents are up-to-date and stored where you can find them? Are you clear on your healthcare wishes and, if you're incapacitated, who has the authority to act on your behalf? These are not typical after-dinner conversations that, in most cases, rarely produce the level of information needed without a clearly documented plan. Families differ greatly in personalities and dynamics, especially in the complexity of financial situations, and, most importantly, in the willingness to relinquish control over what many consider to be the very essence of their independence - finances.

Our professional Advisors will explain the purpose of key legal documents everyone should have along with an Estate Planning Checklist to make the process easy. Having a plan in place will ensure your financial success for today and for your family, tomorrow, providing peace of mind for all.

### OUR SERVICES

**Strategic Wealth Management**

- Financial planning
- Generational planning
- Retirement plan rollovers
- Business succession planning
- Portfolio management

**Trust and Estate Services**

Our trust services have a long history of helping families and businesses manage estates, wills, and custody of important documents. We are experts in trust management with dedicated professionals to personally meet with you through the trust and/or estate process. Trust and Estate Services include:

- Trustee for Living Trusts, Special Needs Trusts, Trusts Under Will, and Charitable Trusts: Administration and portfolio management in accordance with the terms of the legal document.
- Estate Settlement: Administration of the estate with your beneficiaries, ensuring all applicable taxes and regulatory requirements are met prior to distribution to your beneficiaries.

**Investment Management**

We offer customized solutions using independent research, expert analysis and objective advice. Our professional staff will work personally with you to identify the best strategy for your investments.

### GET STARTED TODAY

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BCT WEALTH ADVISORS

ROOTED IN TRADITION.
GROWING OUR COMMUNITIES.

mybct.bank



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