



FIDUCIARY SERVICES
provided by

TOMPKINS 
Trust Company
Wealth Managers Since 1891

Tompkins' fiduciary services team has a unique depth and breadth of experience, and our priority is to carry out your plans.

Having roots in our local communities enables us to provide *personalized service with a focus on individual relationships*. As a result, our relationships with beneficiaries endure for generations, and span throughout the United States and abroad.

Our expertise includes:

- Seasoned trust officers from diverse backgrounds with over sixty years of combined experience while at Tompkins Trust Company
- A trust counsel team of three attorneys with extensive private practice experience
- A dedicated trust tax and estate officer providing in-house fiduciary and estate tax services as well as accounting services



Our services.

Trust Administration

- Unbiased trust administration
- Dedicated trust professional assigned to each client's account
- Sound stewardship of trust assets in accordance with the prudent investor standard
- Thoughtful exercise of distribution discretion
- Integrity in carrying out the grantor's intentions

Estate Administration

- Careful handling of even the most complex and challenging estates
- Experienced administration of estates with charitable beneficiaries
- Skilled collection, protection and administration of estate assets
- Management of the probate process for smooth, timely and orderly distribution

Tax Services

- Preparation of tax forms to track and report all taxable income and deductible expenses for trusts
- Preparation and filing of trust tax returns and K-1s for taxable income and deductible expenses for trust beneficiaries
- Preparation and filing of trustee and executor accountings
- Preparation of annual charitable trust filings

The strength and stability of Tompkins.

Tompkins Trust Company is part of Tompkins Financial Corporation, one of the nation's most respected financial organizations. Tompkins Financial was founded in central New York more than 178 years ago and is still headquartered there. The company is recognized as one of the strongest and best performing financial institutions in the country by many third-party organizations.

Tompkins Financial at a Glance:

- Publicly-traded (NYSE MKT: TMP)
- Founded in 1836
- More than \$5 billion in assets
- More than \$3 billion in wealth management assets
- Ranked among the nation's strongest and most stable banks
- Paid cash dividends for more than 80 consecutive years
- Increased cash dividends for 26 consecutive years

Affiliate offices across New York State and southeast Pennsylvania.

Investments are not insured by the FDIC, not deposits of, obligations of, or guaranteed by the bank or its affiliates, and are subject to investment risk including possible loss of principal.

Contact us.

Central New York | 119 East Seneca St. | Ithaca, NY 14850 | **607.273.0037**

Western New York | 179 Sully's Trail, Suite 200 | Pittsford, NY 14534 | **585.248.0050**

Hudson Valley | 10 Bank St. | White Plains, NY 10606 | **914.946.1277**

Southeastern Pennsylvania

1240 Broadcasting Rd. | Wyomissing, PA 19610 | **610.372.7737**

1767 Sentry Parkway West, Suite 210 | Blue Bell, PA 19422 | **610.372.7737**

[tompkinsfinancialadvisors.com](https://www.tompkinsfinancialadvisors.com)