

# HERITAGE TRUST COMPANY OF NEW MEXICO

## TRUSTED PROFESSIONAL PARTNERS



Families and businesses depend on you—accountants, attorneys, investment advisors, and bankers—to provide solid advice about legal and financial matters. But from time to time, you may find that your clients' needs go beyond your scope of services. When they do, turn to a name you and your clients can trust —Heritage Trust Company of New Mexico.

Our services complement yours. We don't draft trust documents, actively manage investments, or accept deposits. We are a corporate trustee.

As the first independent trust company established in Northern New Mexico, we hold a certificate of trust authority from the New Mexico Financial Institutions Division since 1994. Our professional approach, deep understanding of Northern New Mexico's culture and customs, and our long history in the area have helped us build many successful, mutually beneficial partnerships.



## OUR TRUST SERVICES

**W**e maintain an entrepreneurial style, allowing us to work quickly and efficiently, while strictly adhering to all fiduciary standards and requirements. Our commitment to sound administration and strict compliance allows you and your clients to have peace of mind that their wishes are honored while complying with the law.



***We handle a number of different kinds of fiduciary accounts, such as:***

- Revocable and Irrevocable Trusts
- Charitable Remainder Trusts
- Total Return Unitrusts
- Irrevocable Life Insurance Trusts
- Testamentary Trusts
- Special Needs Trusts
- Income Diversion Trusts
- Employee Benefit Trusts, including 401(k) plans and Deferred Compensation Plans
- Conservators and Guardian Appointment
- Personal Representative Appointments
- Estate Administration





## OUR UNIQUE BUSINESS MODEL

We have developed a unique business model that reflects our independent spirit. We do not subscribe to the traditional bank model of a corporate trustee. Rather, we work with grantors and beneficiaries, and their trusted advisors, to provide personalized service and support that truly reflects the wishes and interests of all the parties.

We understand the evolving nature of the trust business and the increasing sophistication of many grantors and beneficiaries. We know that the future requires an approach that includes the role of an Administrative Trustee, where the investment management function is delegated to a third party either at the direction of the grantors, beneficiaries, or pursuant to the discretion of the Trustee.

We can unbundle trust administration services from investment management services. We provide the fiduciary administrative support allowing the independent investment advisor the latitude to work with grantors and beneficiaries to choose the best investment model, strategy, and portfolio. Independent investment advisors referring business can continue to be the lead contact for the relationship, while utilizing our back-office and administrative support.

We monitor the performance of the trust over time, working with grantors, beneficiaries and you—their trusted advisor—to make sure that the performance in the account meets and exceeds applicable indices.

## OUR COMMITMENT TO SERVICE

Our highly experienced and knowledgeable team of professionals has earned the confidence of many financial professionals, allowing us to grow and service clients located throughout the United States. We take great pride in our ability to provide the administrative support you need in order to insure your clients have the best service possible.

If you have clients that need services which are outside your scope of work, consider referring them to a trusted name — ***Heritage Trust Company of New Mexico.***

*“Heritage Trust is a weird blend of fastidiousness and entrepreneurial spirit.”*

Rob Rikoon  
The Rikoon Group  
Santa Fe, NM

*“We strongly recommend Heritage Trust for their work with my client as both her financial assistant and her personal watchdog.”*

P A. Lawson  
Managing Director  
Trust and Fiduciary Group  
Philadelphia, PA

