CHEVY CHASE TRUST
INVESTMENT ADVISORS

Chevy Chase Trust as Trustee or Executor

Finding the best executor or trustee to manage and protect your assets in accordance with the terms of your will or trust is a critical step toward achieving financial peace of mind. An executor or trustee should possess strong investment management and administrative skills, remain current on all tax and estate laws, be financially responsible and accountable and exercise its discretion in an impartial and balanced manner. Here's why clients have confidence in choosing us as their designated fiduciary:

Experience

Our staff of fiduciary, administrative and investment professionals averages more than 20 years of experience in executing the duties set out in wills and trust documents. We are focused on providing each of our clients with unparalleled service. Over the years, we have earned an outstanding reputation for timely decision-making, attention to detail and superior client communication. We lack the typical "red tape" and bureaucratic hurdles that have become common in fiduciary institutions. We develop personal relationships with the beneficiaries, ensure they understand the terms of the governing will or trust, and consider them our clients.

Services

Fiduciary relationships are managed by a knowledgeable team that includes our Chief Fiduciary Officer, a Senior Trust Officer, a Financial Planner, a Portfolio Manager and a Tax Officer. The Chief Fiduciary Officer is responsible for ensuring that the terms of the documents are followed and all legal requirements are met. The Senior Trust Officer is responsible for maintaining complete accounting and tax records for each estate and trust and for all day-to-day administrative contact. The Financial Planner works with the beneficiaries and the Portfolio Manager on an investment strategy designed to achieve the unique short-and long-term goals of each estate and trust. The Portfolio Manager implements the investment strategy by customizing and maintaining portfolios of individual stocks, bonds and cash. Our Tax Officer prepares the necessary fiduciary tax returns. Other specialists and outside advisors are consulted as needed.

Impartiality

As trustee or executor, we are charged with fulfilling the fiduciary requirements set forth in the will or trust and applicable law, always balancing the objectives and best interests of the beneficiaries.

Cooperation

In some instances you may chose to have a family member or other advisor serve as a co-executor, co-trustee or trust protector. We fully cooperate with them to achieve the best result for your estate or trust and the beneficiaries. We also work collaboratively with the estate or trust's other advisors, such as attorneys and accountants, to ensure efficient and complete administration of the estate or trust.

Permanence

As a corporate fiduciary, Chevy Chase Trust is available to assist our clients and their beneficiaries on a continuum. A client who names us as executor or trustee will have a relationship that can continue when their assets pass to or for the benefit of their beneficiaries. An individual trustee may move away, be distracted by personal or business concerns, lose interest or pass away. Chevy Chase Trust will not. You can have confidence that we will serve you and your beneficiaries today and through the years to come.

Privately Owned and Regionally Focused

Chevy Chase Trust is privately owned and regionally focused. Our 85 professionals are located in Bethesda, Maryland and have the advantage of working under one roof. While we maintain an international clientele, a majority of our clients reside in the Mid-Atlantic states. With all decision-makers in one location, clients receive answers to questions expeditiously.

Privacy and Confidentiality

Our clients and their beneficiaries share sensitive family and financial information with us and we are committed to honoring the confidential nature of that information, as well as each client's right to privacy.