

Corporate Fiduciaries

Clients hire corporate fiduciaries to serve as their executors and trustees for many reasons, including their expertise and sophistication, their objectivity in deciding financial issues without emotional involvement with the family, their stability over decades, and their ability to provide “one-stop shopping” for all the financial services a family might need. Our corporate fiduciary clients include banks and their private bank subsidiaries offering trust services on either a regional, national or international basis; professional trust companies; and broker/dealers or financial advisors offering professional trust services.

Bressler has represented financial services companies for decades, and we understand the challenges corporate fiduciaries face. We guide our corporate fiduciary clients by ensuring they remain compliant with Reg. 9 and the other governance standards they are subject to; assisting in trust interpretation/construction issues including applications to courts for judicial guidance; advising on the most efficient, and least disruptive, ways to modify or terminate a trust, including use of the Uniform Trust Code, through judicial application, or via decanting; and defending our clients’ administration, investment choices and accountings informally and in litigation. Corporate fiduciaries are held to a higher standard because of their expertise; we believe they deserve to be represented by counsel with similar experience, sophistication and ability.

Articles & Publications

Principal Andy Egan quoted in recent New York Times Best Seller Media Mention, *You Will Own Nothing*, 08.02.2023

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