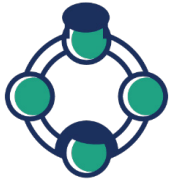


Who We Help



PRESERVE FAMILY HARMONY

Those looking to relieve loved ones of the burden of dealing with legal complexity during a difficult time



LOVED ONE WITH SPECIAL NEEDS

Members with a loved one with special needs must plan carefully to preserve eligibility for government benefits



BLENDED FAMILIES

Married members with kids from a previous relationship must plan carefully to protect biological kids from disinheritance



FINANCIALLY INEXPERIENCED LOVED ONES

Members can restrict trust distributions, reducing the likelihood that loved ones will squander their inheritance



BABY BOOMERS

Without an estate plan in place, a judge will decide who will take control of a member's assets in the event of incapacity



THOSE WITH NO/DISTANT KIDS

Members who live far from loved ones must plan ahead to ensure financial affairs are managed upon death/incapacity



How We Help



TRUSTEE

For members who pass away or become incapacitated, MTC steps into their shoes and administers their trust



FLEX IRA

Members can control post-death distributions to loved ones of retirement funds



PERSONAL REPRESENTATIVE

MTC helps members who die with or without a will by administering and settling the estate via probate court process



AGENT FOR TRUSTEE

An option for individual trustees who want to tap into the resources of a professional trustee



ATTORNEY IN FACT

When members do not have anyone to appoint, they can authorize MTC to serve in their Financial Power of Attorney



GUARDIAN/ CONSERVATOR

MTC can be appointed by a judge to manage the financial affairs of another due to physical or mental limitations

