TRUST SERVICES FOR
MILITARY FAMILIES

AAFMAA WEALTH MANAGEMENT & TRUST LLC

AAFMAA®
COMPASSION • TRUST • PROTECTION
AAFMAA Wealth Management & Trust LLC

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TRUST SERVICES FOR MILITARY FAMILIES

Protect Your Legacy. Preserve Your Wishes. Support the People Who Matter Most.

Creating a trust is about more than transferring assets – it’s about protecting the people you love and ensuring your wishes are carried out with care, continuity, and professionalism.

At AAFMAA Wealth Management & Trust LLC (AWM&T), we provide fiduciary trust services designed specifically for military families. Whether you’re planning for the future, preparing for retirement, or thinking about the next generation, we’re here to help you navigate every stage of the journey.

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WHY CONSIDER A PROFESSIONAL TRUSTEE?

Serving as a trustee is an important responsibility that often extends far beyond managing assets.

A trustee may be responsible for:

- Administering your trust according to its terms
- Managing investments and trust assets
- Maintaining records and preparing tax documentation
- Communicating with beneficiaries
- Coordinating with legal, tax, and financial professionals
- Making impartial decisions while carrying out your wishes

While many families successfully appoint a trusted loved one, others prefer the continuity, objectivity, and experience of a professional fiduciary.

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TRUST SERVICES DESIGNED FOR MILITARY FAMILIES

Our comprehensive trust services include:

- **Trust Administration:** Professional oversight of trust assets, distributions, recordkeeping, and fiduciary responsibilities.
- **Acting as Trustee:** Serving as a sole trustee, successor trustee, or co-trustee as part of an ongoing client relationship.
- **Trust Settlement Support:** Helping families navigate trust administration and settlement after a grantor's passing.
- **Special Needs Trust Administration:** Supporting beneficiaries while helping preserve eligibility for important government benefits.
- **Real Estate & Unique Asset Management:** Managing real estate and other unique trust assets, including valuation, ongoing oversight, insurance coordination, and tax-related responsibilities.
- **Technology-Driven Transparency:** Providing ongoing guidance and clear communication to beneficiaries while administering the trust according to its terms.

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WHY MILITARY FAMILIES CHOOSE AWM&T

Military families face unique financial and legacy planning considerations. From frequent relocations and deployments to retirement transitions and multigenerational planning, AWM&T was created specifically to serve those who serve.

When you work with us, you'll benefit from:

- Military-focused fiduciary guidance
- Personalized trust administration
- Integrated trust and investment solutions
- Transparent fees
- Experienced professionals committed to acting in your best interest

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OUR PROCESS

- **Discover:** We begin by understanding your goals, your family, and your vision for the future.
- **Design:** We work alongside you and your estate planning attorney to help ensure your trust supports your objectives.
- **Implement:** We coordinate trust funding, administration, and asset management with care and precision.
- **Support:** As life changes, we're here to provide ongoing administration, oversight, and periodic reviews to help keep your trust aligned with your wishes.

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PRESERVE YOUR LEGACY
WITH CONFIDENCE

Whether you're creating your first trust, reviewing an existing estate plan, or considering a professional trustee, AWM&T is committed to helping military families protect what matters most.

Speak with one of our professionals today to learn how our trust services can support your long-term financial and legacy goals.

To learn more, speak with an AWM&T professional or call **910-307-3500.**

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