



Maine Fiduciary Services

An affiliate of **RUDMAN • WINCHELL**

At Maine Fiduciary Services, we're dedicated to safe-guarding your financial future and your loved ones'.

We take on essential responsibilities to aid the well-being of individuals and the management of their estates. Our role can vary, including serving as trustees, personal representatives, or conservators. Our primary duties to our clients and beneficiaries fall into two categories:

Duty of Loyalty:

We act in their best interests at all times.

Duty of Care:

We handle a variety of tasks tailored to their needs.

With expertise and a deep commitment, we create personalized solutions to help you protect what matters most.

As a **Trustee, Personal Representative, and/or Conservator** we offer:

- Bill Payment
- Expense Tracking
- Income and Outflow Management
- Account Reconciliation
- Tax Compliance
- Beneficiary Communication
- Funds Distribution
- Timeline Management
- Annual Review

For **Special Needs Trusts** we also offer:

SSI and Medicaid Compliance:

We ensure that trust spending aligns with SSI and Medicaid income and resource rules, preserving the beneficiary's eligibility for public benefits.

Enhancing Quality of Life:

Our focus is on preserving the dignity and quality of the beneficiary's life. We provide guidance on trends and new tools to enhance their independence, including the use of ABLE accounts.

5 KEY BENEFITS of hiring a fiduciary:

We aim to provide the highest level of support, security, and peace of mind for our clients and their beneficiaries.

1. Expert Guidance

Access to experienced professionals who provide expert legal and financial advice.

2. Objective Decision-Making

Assurance that your fiduciary always acts in the best interest of you and your loved ones.

3. Peace of Mind

Reduced stress and confidence that your affairs are being expertly managed.

4. Asset Protection

Diligent oversight and risk management to ensure compliance with legal and tax obligations.

5. Customized Solutions

Tailored financial strategies and services designed to meet your objectives.

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