

When you think of the process of inheritance, which is the transfer of wealth at death, you need an experienced team of advisors to help you do it right. When you name SVA Plumb Trust Company in your documents for us to act as either personal representative in your will, or as trustee under your trust, we can assure you that we will be acting with the utmost professionalism and care.

At SVA Plumb Trust Company, we have the expertise to help you and your family navigate the very difficult and complicated issues of wealth transfer after death. This may involve the probate of your estate or it may involve the post-death administration of your trust. In any event, we are going to work very closely with your other advisors. Your team might include your accountant, your attorney, as well as us. We are all going to be working together for a seamless transition. We are also real people with years of experience. We want to do this right, we want to be able to follow the directives in your document; to leave the legacy you want to leave. We want to make this as easy as possible for you and your family. We are here to help your family through what is a very difficult and emotional time. Remember, that we are here for you.