Wealth Planning

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Wealthy families don't succeed by accident. Planning is necessary for a family's wealth and values to persevere through many generations. However, the best wealth management plan cannot succeed if the pieces are planned in isolation.

Sentinel Trust takes a holistic view of tax, estate, investment, family business, governance, and philanthropic goals to develop and manage each highly customized wealth management plan. **It begins by getting to know you, your spouse, and if appropriate, your children and their children.**

While we must defer to practicing attorneys and accountants to draft documents and prepare tax returns, **our experience with many families of extraordinary means allows us to assist in the development of formalized plans**. Because we are chartered as a trust company, we are able to serve as corporate fiduciary and effectively administer complex planning vehicles.

Know also that we can speak in plain English, without acronyms or legalese. **We are warm. We are engaged. We are smart.** We consider even the smallest details – both financial and interpersonal. We are passionate about this work and it shows.

Perhaps, for the first time, your family will love it too.