



Trust Services



A Seamless Integration of Services

THE VALUE OF AN INDEPENDENT THIRD PARTY

Clients often require an independent third party to act in a fiduciary role as a trustee or a co-trustee of a trust, or an executor of an estate. An independent trustee can provide flexibility to many trust structures. Oxford Financial Group, Ltd. established The Trust Company of Oxford so those

needs could be seamlessly integrated with the investment and planning services we provide. Assets held at The Trust Company of Oxford are maintained in segregated accounts, apart from the assets of Oxford Financial Group, to maintain the highest level of security and protection.



“Having a trust company in the Oxford family means that a client only needs to make one phone call and I can pull all the pieces together for them.”





SEPARATE BUT ALIGNED

Although The Trust Company of Oxford is a separate legal entity, its subsidiary relationship with Oxford Financial Group enables us to align the services offered by the two organizations. Each client enjoys the benefit of an Oxford Financial Group partner dedicated to the account, complementing the expertise of a Fiduciary Officer.

The Oxford/TCO team coordinates a common set of objectives for each client. Client records and documentation are maintained in one place. This alignment can be particularly valuable during life's transitions such as a marriage, a child reaching the age of majority, the sale of a business or a death in the family.

ENHANCING LIVES AND ENRICHING LEGACIES

Although people often equate trust company services with restrictive financial situations and complicated estate plans, the principal focus of our work is to enhance the financial lives of our client families and communities. Educational trusts can help children and grandchildren go to college. Marital trusts can help a surviving spouse's standard of living.

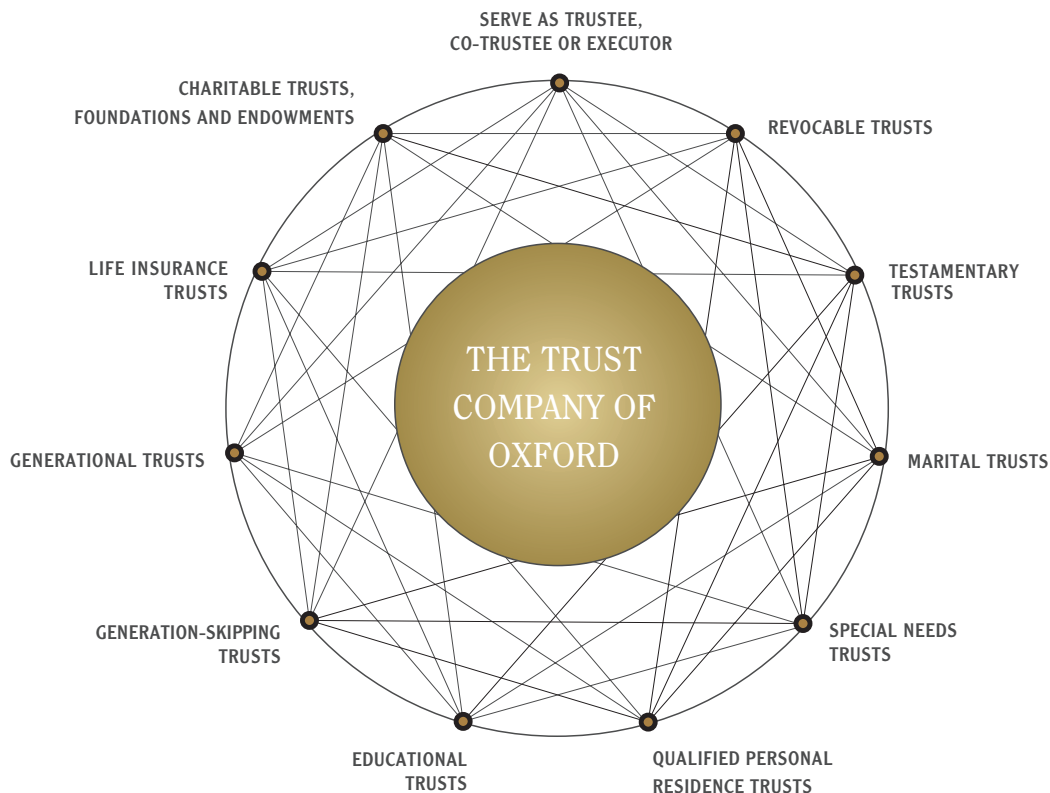
Family and generation-skipping trusts can provide generations with ongoing financial support. Life insurance trusts can often mitigate taxes. Charitable trusts can enable clients to enjoy the satisfaction of philanthropy in their own lifetimes and for lifetimes to come.

WEB ACCESS

Clients of The Trust Company of Oxford have secure, online access to their accounts and can review their current value, transaction history and monthly statements. Access is available 24 hours a day, seven days a week.

INDEPENDENT AND FEE-ONLY

Like Oxford Financial Group, The Trust Company of Oxford operates as an independent, fee-only company. We receive no revenue from commissions, 12b-1 fees, referral fees or fee-sharing, and we do not sell life insurance, investments or any other products. Our sole commitment is to serve each client's best interests at a fair price.



THE TRUST
COMPANY OF
OXFORD

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