Edward Jones Trust Company

Edward Jones Trust Company Services

Some people reach a point in their lives where they'd like to delegate the task of managing their assets and finances – or take steps to ensure the legacy they've worked hard to build is properly handled, today and in the future. Edward Jones Trust Company offers professional trustee and wealth management services that, depending on the capacity in which we serve, may include:

Asset Management

- Maintain a diversified portfolio based on trust specifications, beneficiary needs and/or your investment objectives and administrative needs
- Provide ongoing communication through an Edward Jones financial advisor regarding our recommendations for the account's assets
- Incorporate a disciplined investment approach consistent with Edward Jones
- Appraise, inspect and insure trust-owned real estate holdings
- Supervise the management of trust-owned, property and agricultural interests

Administration Services

- Distribute assets as needed to beneficiaries
- Collect income
- Handle beneficiary requests
- Pay bills
- Prepare annual federal and state fiduciary tax returns or tax information letters
- Coordinate trust and estate settlement activities

Record Keeping, Accounting and Reporting

- Provide clear, comprehensive account statements adhering to trust principal and income accounting standards
- Offer safekeeping of trust-related documents, legal documents and financial records
- Report necessary information to beneficiaries
- Provide up-to-date online access to account information

Working with your team of professionals, Edward Jones Trust Company can evaluate the needs of you and your family and help identify whether trust solutions may meet your needs.

As a professional trustee, Edward Jones Trust Company offers experienced trust administration and asset management. Therefore, you are served not only by a team of trust professionals, but also by the people you've come to know at your local branch office.

Trust Service Offerings

Managing Agent – We can provide discretionary asset management delegated to us through a simple agreement for a trust or personal account.

Trustee or Co-trustee – We can serve as sole trustee or co-trustee (with a family member or friend) to fulfill the duties described above.

Successor Trustee – We can take control of the trust if the trustee resigns or cannot make decisions due to incapacity or death.