



fiduciary services

SPECIAL NEEDS TRUSTS AND GUARDIANSHIPS

Experience and expertise

describe the officers of Pennsylvania Trust in the formation and administration of these complex relationships.

Our officers, many of whom are attorneys, have experience in a number of jurisdictions and provide compassionate, competent, and comprehensive care to families in a number of areas, which include:

Giving “hands on” help in coping with a family member’s physical, cognitive, and/or emotional challenges;

Providing help in securing proper health care and other public benefits;

Facilitating the design and construction of adaptive living spaces and/or the purchase and modification of adaptive vehicles; and

Delivering streamlined and efficient decision making when applicable law requires discretionary distributions.



*Pennsylvania Trust’s team of experienced professionals are a source of thoughtful advice to our clients, whether for themselves or their families.
Peter J. Johnson, Esq.*

SPECIAL NEEDS TEAM

Peter J. Johnson, Esq.
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Director, Special Needs Trusts and Guardianships

Susan L. Bartels
Senior Vice President
Trust and Account Administration

Felicia D. Butler
Account Administrator
Trust and Account Administration

Jacqueline F. Duffy-Cardinal
Account Administrator
Trust and Account Administration

PRUDENT ADVOCACY

Special Needs Trust and Guardianship planning and administration can only be as effective as the sophistication and attentiveness of the professionals serving the client.

Our specialized team, as part of a trust and investment advisory firm, brings considerable expertise and experience to the administration of special needs trusts and guardianships, in even the most complicated situations. We are well prepared to offer thoroughly researched and creative options to clients as they seek to achieve particular goals. We are also highly sensitive to the importance of minimizing the burdens for both client and family.

Passing wealth to future generations,
 transferring ownership of a family-owned
 business,
 protecting those unable to manage
 their own affairs,
 realizing the full value of real estate holdings,
 or
 minimizing income and estate taxes —
 these are some of the concerns of
 wealthy individuals,
 and at no time are the decisions easy.

Pennsylvania Trust

can make them less onerous by
 personalizing estate and financial planning,
 developing imaginative solutions for complex
 financial affairs, and
 protecting assets from unnecessary taxation.

These are the hallmarks of our service.

Pennsylvania Trust is a wealth management organization that seeks to provide for the enrichment of client lives, achievement of life goals, and care for families through investment management, wealth advisory and fiduciary services, and tax, estate, and financial planning services, delivered by a team of experienced and expert professionals. The firm is responsible for the management and administration of over \$3.7 billion of client assets and is independent and employee owned.

A young man, living at home with his parents, was severely disabled through a workplace accident. Wheelchair-bound and communicating only by computer, he was awarded a substantial settlement. Such cases require both astute financial management and flawless administration. The judge appointed Pennsylvania Trust as guardian. When the parents decided to build a house that would accommodate his physical requirements, Pennsylvania Trust was there to help them manage contracts and property settlements. When the young man decided to marry, the sensitivity of the Trust team was instrumental not only in sorting through the guardianship issues, but in helping both the family and the new spouse arrive at equitable legal and financial arrangements.

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