WELLS FARGO Wealth & Investment Management

Estate Services

Offered through Wells Fargo Bank, N.A.

Estate and trust settlement are time-consuming and exacting processes that require the experience and attention to detail of dedicated professionals. The Wells Fargo Bank Estate Services team can provide estate and trust settlement services for large estates or trusts including those with complex assets. The Wells Fargo Bank Estate Services team will manage the entire administration process to settle the estate or trust efficiently and professionally.

What will it take to settle your estate or trust?

Wouldn't you like to pass your legacy on to your beneficiaries in an efficient and effective way? That may not happen without the assistance of a qualified professional. Settling an estate or trust can be a complex and time-consuming matter. The list of estate or trust settlement tasks is long and the tasks themselves are complex and technical. Errors and delays in execution can result in needless litigation, costs, taxes, expenses, and penalties.

With so many complex duties and responsibilities involved and all that is at stake, it is clear that an inexperienced executor—whether a spouse, child, dear friend, or trusted family member, however intelligent or well-intentioned—could put the settlement of your trust or estate (and the relationships of those you care about most) at risk. The use of a professional executor or trustee can help a family maintain harmony in one of the most stressful and emotional situations they may ever face.

Why name Wells Fargo Bank as executor?

When you name Wells Fargo Bank, N.A. to be the executor, personal representative or trustee of your estate or trust, our experienced Estate Services team will work to help ensure that your estate plan is implemented accurately, disputes are handled impartially, and assets are distributed in a timely manner to heirs.

Our dedicated specialists can help you manage a wide variety of aspects associated with the estate or trust settlement process, including estate planning document review, probate and trust administration, post-mortem planning, and fiduciary tax return preparation, and if needed, bring in specialists who can provide specialty asset services for tangible personal property, closely held businesses, real estate, oil gas and mineral interests, and loans and note receivables.

Estate and trust settlement services

When the Wells Fargo Bank Estate Services team is responsible for the management of the estate or trust settlement process, beneficiaries and the testator/trustor may benefit from our experience in professional estate and trust administration to properly administer the estate or trust. In addition, as a corporate fiduciary, we can provide access to solutions and services that an individual executor may not be able to provide, such as:

- Timely collection, valuation, and distribution of assets
- Professional, experienced asset management
- Valuation, management, and disposition of closely held business interests
- Estate, inheritance, and fiduciary income tax preparation utilizing advanced post-mortem planning
- Impartial dispute resolution and objective decision-making
- Resources to properly and efficiently settle estates
- Established processes with a high level of service to families and beneficiaries

A dedicated team of professionals

The Wells Fargo Bank Estate Services team is staffed with experienced and dedicated specialists, including team members who hold advanced degrees and other professional designations. Using a team approach, the Estate Services team at Wells Fargo Bank seeks to bring a wealth of experience, education, problem-solving skills, and insight to estate and trust settlement.

Our objective is to manage the estate and trust settlement process professionally and efficiently in accordance with governing documents and applicable laws.

A commitment to serving our clients

As one of the largest providers of estate and trust settlement services in America, Wells Fargo Bank is committed to providing exceptional service to our clients and their beneficiaries. Estate settlement is an intricate, exacting process and for those you love could be an emotional and financially sensitive balancing act.

To learn more about how the Wells Fargo Bank Estate Services team can help serve the needs of your estate, please contact your relationship manager.

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