



Select a
Licensed Professional Fiduciary
for peace of mind

PROTECT YOUR CLIENTS

Private Professional
Fiduciary Services

Arrange an appointment to find out how
we can help you plan for your clients' future

SantaBarbaraFiduciary.com   



SANTA
BARBARA
FIDUCIARY

OUR SERVICES

☑ FIDUCIARY APPOINTMENTS

We serve in fiduciary appointments such as trustee, executor, durable power of attorney, and health care agent, to help preserve and distribute our clients' assets the way they want - both during their lifetime and the lifetimes of those important to them.

☑ TRUST & ESTATE ADMINISTRATION ASSISTANCE

We assist executors, trustees, and guardians to administer estates and trusts in an organized, timely, tax-efficient manner, while seeking to minimize fiduciary stress, reduce family conflict, and help to preserve positive personal and family legacies.

☑ DAILY MONEY MANAGEMENT

Our daily money management services ensure nothing falls through the cracks including necessities like paying monthly bills, assisting with tax records, balancing checkbooks, decoding medical bills, and consolidating accounts.

☑ SUCCESSOR FIDUCIARY APPOINTMENTS

Looking ahead? Clarity is the first step towards success. Whether you have already clearly defined your goals or need guidance planning for your future, our intake process ensures your wishes are documented and understood.

BENEFITS OF WORKING WITH US

- ☑ Expertise
- ☑ Accountability
- ☑ Availability
- ☑ Objectivity

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