

SANTA  
BARBARA  
FIDUCIARY

## About Santa Barbara Fiduciary

My grandmother was my best friend, my mentor, and my rock. She has been an inspiration to me throughout my entire life. She carried herself with dignity, strength, and class. She moved through social circles with commanding power, grace, and elegance. Though she was not an easy person to please, there was no better feeling in the world than earning her respect.

The unspoken bond I had with my grandmother became a serious commitment and challenging passage into the unknown as her health declined. The challenges I faced and lessons I learned, became the foundation for Santa Barbara Fiduciary. Santa Barbara Fiduciary is my calling and was my grandmother's parting gift to me.

## About Lindsay Leonard

Owner | Founder

Lindsay is a graduate of the University of California Santa Barbara, where she earned a degree in Biological Sciences with an emphasis in molecular, cellular, and developmental biology. After graduation, she worked in research and development of next-generation antibody therapeutics immunotherapies for the treatment of cancer, and in two, well-known asset management firms in the Santa Barbara area as a junior financial analyst.

Lindsay has been a fully licensed California Professional Fiduciary since 2010 (#PF470), and has certifications in Professional Fiduciary Management for Conservators and Trustees. She is a National Certified Guardian, a Registered Trust & Estate Practitioner (TEP), and a member of the Santa Barbara Estate Planning Council.

## Licensed Professional Fiduciary Services



The Expertise,  
Integrity & Fortitude  
To Honor Your Wishes



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SantaBarbaraFiduciary.com



## What We Do

At Santa Barbara Fiduciary, we serve as a source of security, compassion, and strength to elders, and those supporting them, through challenging life transitions. As objective, third-party professionals, we honor our clients' wishes through diligent implementation of their succession plan. We take pride in our ability to handle complex administrations, accountings, and finances. We deliver high quality work product using strategic thinking, good judgment, and integrity.

By having a deep understanding of the responsible stewardship of assets through generations and translating that into efficient and meaningful fiduciary services, we've built a distinct track record of success.

It is our duty and an honor to protect the wishes and best interests of those we represent.

## 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.



### Accounting & Financial Concierge Services

From bill pay, bookkeeping, and reporting, to tax compliance, investment monitoring, and property management, we ensure your finances are handled with precision and care. Maximize returns, minimize risks, and experience the freedom to focus on what truly matters while we protect and preserve your wealth.



### 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.

## Our Principles

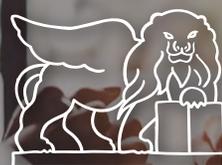
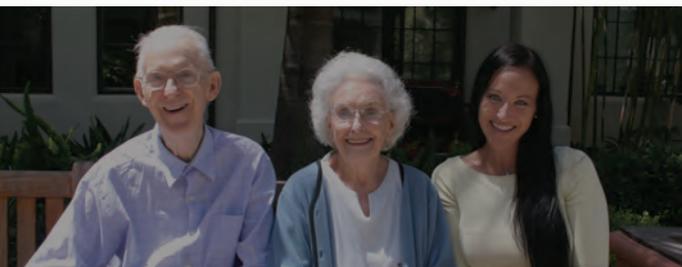
- Hard work, accomplishment, and the pursuit of excellence.
- A deep commitment to education, development, and innovation.
- The creation of meaningful work and meaningful relationships.

## Our Specialization

- Accounting & Finance
- Managing Complex Assets
- Complex Administrations
- Elder Support & Preparedness
- Organization, Technology, & Innovation

## Benefits of Working with Us

- Expertise
- Personalized Services
- Objectivity
- Diligence
- Accountability
- Team Approach
- Flexibility
- Accessibility
- Transparency
- Confidentiality



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