

# ATLANTIC TRUST

PRIVATE WEALTH MANAGEMENT

## Case Studies: Creating Solutions and Strong Relationships

When Atlantic Trust understands your needs—whether for next year or the next generation—we develop solutions that are highly personal, a reflection of your values and customized to your goals.



A MATTER OF TRUST

### Love and Legacy:

#### A Solution for Family Philanthropy

How do you make sure giving is right for today—and in place for tomorrow? When Mary Russell came to the firm, she had some immediate needs, including diversifying a heavily concentrated portfolio of investments—\$20 million in just 20 stocks. Without taking care of that situation, we wouldn't have been able to put into place the strategies for a tax-efficient transfer of wealth to the next two generations and for her to continue her current annual gifting to arts and education. It was also very important to Mary that her daughter, grandchildren, and great-grandchildren continue her legacy of charitable giving. A new charitable remainder trust gives Mary income to sustain her current lifestyle and fund her gifts. A private foundation gives the next generations a way to take part in processing grants and make Mary's money keep on giving. Through our integrated approach, the Atlantic Trust team ensures that the investments in each vehicle are appropriate to its purpose. This family will continue to give life to Mary's wishes for many years to come—and they don't need to know what a CRT, Family LLC, or GRAT is. But they do know that we know.

This case study is based on actual Atlantic Trust clients' experiences, but names and certain details have been changed to protect our clients' privacy.

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