

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.



Music at Heart:

Embracing a Family's Values

John Ward was a former concert violinist whose grandchildren had inherited his love of music. He wished to foster that love, not only to appreciate, but also to play, classical music. At an auction of valuable instruments, John bid on an antique violin even though he did not have the funds to pay for it. His desire to purchase the violin was not only for its own intrinsic beauty and value as a collectible, but also to perpetuate a family music legacy. Then he asked Atlantic Trust to make a distribution to cover the purchase from a trust established by his father for him and his descendants. The Distribution Committee evaluated the usual considerations, including the terms of the trust, John's resources, the amount of the distribution in relation to the total value of the trust and the prior distribution history. In addition, the Committee discussed the importance of conveying the family's cultural values to future generations, and they ultimately approved John's request. And so, the music of one generation lives on in the next.

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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