



Simplify estate planning.

Explore full-service solutions for you and your loved ones.



On your team. On your terms.

At BECU Trust Services, we're committed to the credit union philosophy of "People helping people." And we're here to help you and your loved ones navigate the complexities of managing finances, investments, trusts, and estates.

With a range of custom-tailored services and solutions, we help people from all walks of life manage their financial, administrative, and legal responsibilities. Contact us today to learn how we can support your needs and goals.



TIME-TESTED, LOCALLY LOVED



With a combined 140+ years of experience, our Trust Officers have been guiding Pacific Northwest residents since 2003.

HERE FOR THE LONG HAUL



As a 100% true fiduciary, we build lasting relationships and focus on the unique needs and goals of those we serve.

A REPUTATION FOR EXCELLENCE



Backed by an 88-year history and 80+ Net Promoter Score,¹ BECU and our BECU Trust team are well respected across the region.

PEOPLE OVER PROFIT



Our competitive, transparent fees and lower account minimums make us a great choice for trusts and estates.

Explore our personalized solutions.

Call: **206-812-5176**

Email: **becustrust@becu.org**

Visit: **becu.org/trust**

Personal guidance today

We can provide a range of services if you or a loved one need help managing your finances.

Investment management: Get help with portfolio management and investment planning, including tax strategy, wealth transfer, FlexIRATM, and other services.

Concierge services: Tap into professional support to coordinate bill payment, facilitate tax returns, manage investment properties, and organize eldercare services.

WHAT WE DO

- Craft your plan and make sure that it is adhered to.
- Take on legal and financial responsibilities and act as a neutral third party.
- Ensure assets are handled properly, plus manage taxes and other liabilities.
- Reduce the risk of fraud, facilitate graduated care, and recommend professional services.



Peace of mind tomorrow

We manage a variety of trusts to make sure your wishes are carried out when the time comes.

Trust and estate administration: Ensure that your assets are distributed appropriately and that all legal, tax, and administrative matters are professionally managed. You can set up a range of trusts, including revocable living trusts, irrevocable trusts, and others. Plus, we can help:

- Consolidate and safeguard assets.
- Manage investments.
- Serve as financial durable power of attorney.
- Coordinate payment of utility, insurance, and tax bills.
- Manage real estate.
- Take inventory and assess value of personal property.
- Determine debts and claims.
- Coordinate preparation of final tax returns.
- Facilitate final distributions of assets and personal property.

WHAT WE DO

- Serve as your agent to offer an experienced, objective voice.
- Ensure that your estate is efficiently managed by professionals.
- Relieve the legal and administrative burden on family members.
- Act as a neutral third party to help prevent family conflict over assets.



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¹Internal data. NPS[®] measures the likelihood that a customer will refer a business to friends. BECU credit union members give BECU an NPS in the gold-standard range.

BECU Trust Services is a trade name used by Members[®] Trust Company under license from BECU. Trust services are provided by Members[®] Trust Company, a federal thrift regulated by the Office of the Comptroller of the Currency.

MTC does not intend to provide legal or tax advice; please consult with your attorney or tax professional.



Trust and investment products are not deposits of or guaranteed by the trust company, a credit union, or credit union affiliate, are not insured or guaranteed by the NCUA, FDIC, or any other governmental agency, and are subject to investment risks, including possible loss of the principal amount invested.