

HERITAGE TRUST COMPANY OF NEW MEXICO

TRUSTED PROFESSIONAL PARTNERS



Families and businesses depend on you – local attorneys, investment advisors and bankers – to provide solid advice about legal and financial matters. But from time to time, you may find that your clients' needs go beyond your scope of services. When they do, turn to a name you and your clients can trust – Heritage Trust Company of New Mexico.

We offer a selection of unique services to people who want help managing the disposition of wealth, possessions and other personal concerns from generation to generation.

Our services complement yours. We don't draft trust documents, actively manage investments or accept deposits, we are a corporate trustee.

As the first independent trust company in Northern New Mexico, we hold a certificate of trust authority from the New Mexico Financial Institutions Division. Our professional approach, deep understanding of Northern New Mexico's culture and customs, and our long history in the area have helped us build many successful, mutually beneficial partnerships.





TRADITIONAL TRUST SERVICES

For many of our clients, we serve as a trustee, managing the funds, property and other assets within a trust.

We specialize in compliance and administration and ensure a professional, accurate and timely approach to administrative tasks.

Our Trust Services include:

- Coordinating the establishment of new trusts
- Assuming the management of existing trusts
 - Assessing financial holdings
 - Hiring outside counsel
 - Acting as a personal representative





FINANCIAL CONCIERGE

If you have clients with financial and life situations that require unique solutions, our Financial Concierge service is the answer. We will customize a package of personalized financial and life-management services to meet any need. These time-saving, confidential services are especially valuable for seniors who live alone or in senior care facilities, those who are physically or mentally incapacitated, and people who travel away from home for extended periods of time. A Heritage Trust Financial Concierge

serves as a reliable, compassionate advisor, as well as a constant communicator for the client, concerned family members and other professional consultants.

Our Financial Concierge Services include:

- Bill paying
- Checkbook balancing
- Record-keeping
- Reviewing mail
- Supervising hired staff – medical care-givers, housekeepers and maintenance people
 - Overseeing property management
 - Conservatorship
 - Guardianship

We offer many other services too – charitable giving, investment management, tax review and tax preparation. If you have clients that need services which are outside your scope of work, consider referring them to a trusted name – ***Heritage Trust Company of New Mexico.***



Your Heritage Trust Partners:
Juana Bergerson, Jenny Trindel, Fred Winter, CPA, Glenda Mondragon

“Since Heritage Trust has been associated with one of my clients, her family and I have had complete confidence in their management of my client's financial affairs. I speak on behalf of my client who has told me many times how dependent and confident she feels about Heritage Trust. We strongly recommend Heritage Trust for their work with my client as both her financial assistant and her personal watchdog.”

P A. Lawson
Managing Director
Trust and Fiduciary Group
Philadelphia, PA

