

Estate Planning, Probate, and Trust Administration

FAMILY AND PRIVATE TRUST COMPANIES

When it comes to preserving generational wealth, an intriguing option for some high-net-worth families may be an Ohio Family Trust Company.

Authorized by statute in Ohio, this private trust company option is a family-owned and operated entity that can oversee as a fiduciary the trust assets for multiple generations of a single family. Ohio's family trust companies may be licensed (and therefore regulated by the State) or unlicensed. Critchfield's attorneys work with clients to determine whether a family trust company is an appropriate wealth preservation vehicle for a family as it plans for the future. Once the decision is made to proceed, we collaborate with the family to create the most beneficial ownership structure and provide ongoing counsel in regard to operations and compliance, including administrative operations, tax requirements, and financial operations.

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