Firm Profile

THE SOURCE

MIDWEST TRUST

Founded 1993

Who Is Midwest Trust?

A full-service wealth management institution formed in 1993 as an independent state chartered trust company, offering complete trust services in the area of personal trust administration, estate planning, investment management, charitable and foundation management, retirement and investment planning, profit sharing and 401(k) programs.

Customized Planning and Administration

We provide strength and reliability with local expertise and services for your personal and corporate strategies.

- Comprehensive trust administration
- Disciplined and sophisticated investment advisory services with asset allocation strategies appropriate to meet needs of present and future beneficiaries
- Business succession planning in conjunction with your attorney and accountant
- Education and planning for the next generation
- Comprehensive retirement and IRA planning
- Solution based financial planning services

Our Trust and Administrative Professionals

- Expert administration and trusted advice from specialists with an average of over 25 years' experience
- Estate planning assistance dedicated to providing our expertise to your trusted advisors such as attorneys and accountants
- Expertise of trust officers who understand the regulatory, legal and tax implications of trusts and estate planning
- Solutions for all of your wealth management needs including real estate, closely-held business, limited partnerships, mineral interests and unique assets