WASHINGTON TRUST
Wealth Management®

Age With Wisdom

Solutions for aging with confidence.

In life's unpredictable journey, without proper planning, a health crisis or other unexpected life event could leave you or your loved one's financial well-being vulnerable, and your care needs uncertain.

At Washington Trust Wealth Management, our relationship with you or your caregiver goes beyond financial planning and investment advice to implement a complete solution, including trust services, and access to lending and banking, so your entire financial life is well coordinated.

Our credentialed professionals with experience in financial planning, investments, and trust and estate administration - in conjunction with our partners in law, accounting, healthcare and residential care - create a seamless support system designed specifically for you and your loved one in the golden years. Our integrated approach ensures you'll never face these challenges alone.

Customized support for you and your caregiver so you can age comfortably.

Asset protection planning during a health crisis or other unexpected life event.

Seamless asset and estate management during temporary or permanent incapacity.

Professional guidance across all aspects of wealth preservation.

Banking and lending solutions to meet your and your loved one's needs.

800-582-1076 | washtrustwealth.com

Planning for the unexpected.

Don't leave your future to chance. Let Washington Trust Wealth Management help create the safety net you deserve, so you can face tomorrow with confidence.

MANAGING YOUR ASSETS	Assistance in organizing assets, titling accounts, designating beneficiaries, and implementing trust vehicles to avoid probate and provide continuity of asset management during times of incapacity.
FUNDING YOUR NEEDS	We serve as Trustee of irrevocable trusts created for beneficiaries who qualify for Medicaid benefits. In addition, Washington Trust's lending team can help to fund home improvements for occupational care needs through home equity lines of credit[1], reverse mortgages[2], and securities-based lending.
ASSET PROTECTION	Our team of advisors will help you and your caregiver understand various asset protection strategies through vehicles such as insurance and irrevocable trusts. We can also help you and your caregiver identify fraudulent schemes and potential bad actors.
LEGACY PLANNING	Our team works with you and and your professional advisors to find the right solutions to pass on your legacy and ensure your estate planning goals are implemented.
SAVING FOR THE FUTURE	Washington Trust offers a full suite of deposit account options[1], including checking, savings, and Certificates of Deposit (CDs) to help you meet your long- or short-term goals.
RESOURCE SHARING	Receive access to an extensive library of educational materials, tools, and professional advisors qualified in matters such as legal, financial, tax, retirement benefits, and governmental assistance.

To find out more about the benefits of being a Washington Trust Wealth Management client, call 800-582-1076.

Washington Trust Wealth Management has been providing client-focused financial solutions to individuals, families, foundations, endowments, municipalities, and businesses for more than a century. Backed by the strength and stability of a 225 year-old financial institution, our group has developed a unique approach to holistic wealth management that includes customized financial planning, broad investment management capabilities, full trust services, and access to banking and lending solutions.

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[1] Deposit accounts, home equity lines of credit, and securities-based lending are offered by The Washington Trust Company, Member FDIC, Equal Housing Lender, NMLS #414726

[2] Washington Trust Mortgage Company, Equal Housing Lender, NMLS #901927; MA Mortgage Broker License #MC901927, MA Mortgage Lender License #MC901927, RI Lender License #20122863LL, RI Loan Broker License #20122864LB, NH Mortgage Banker License #18233-MB. For Reverse Mortgage: We arrange but do not make loans. MORTGAGE BROKER ONLY, NOT A MORTGAGE LENDER OR CORRESPONDENT LENDER. This material is not provided by, nor is it approved by the Department of Housing & Urban Development (HUD) or by the Federal Housing Administration (FHA). You should consult your benefits specialist, or financial advisor as Reverse Mortgage payments may have an effect on your particular situation.

EQUAL HOUSING LENDER