



gtc

# Guardianship & Trusts Corporation

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# About GTC

**Guardianship and Trusts Corporation** is a unique organization operating as the only non-profit Trust Company in Tennessee, and one of the few of its kind in the country. In its daily operations, GTC provides financial and personal fiduciary services as Guardian, Conservator, Trustee and Attorney-in-Fact to persons with mental and physical disabilities of all ages, from infants to the elderly. Our staff consists of professionals from various backgrounds, each a National Certified Guardian and a qualified member of the National Guardianship Association and the Conservatorship Association of Tennessee. Our accomplished Board of Directors is comprised of physicians, nurses, social workers, attorneys, trust officers, brokers and bankers. Their commitment, knowledge and experience enables GTC to offer a high level of service to our clients, allowing for cost efficiency.

## OUR BACKGROUND

**GTC** was founded in 1981 by a disability advocacy organization, responding to a need to serve in various fiduciary capacities for persons with physical and mental impairments – in many cases those having no family, friends or others willing or able to assist them. In 1983 the Tennessee Department of Financial Institutions granted GTC a Certificate of Authority to do business as a non-profit Trust Company.

As a 501c3 organization, GTC relies heavily on donations, grants and contributions to serve its most needy clients at reduced fees or at no cost. Donations may be tax deductible as allowed by IRS regulations.

## SERVING AS A TRUSTEE FOR ...

**Separately Managed Trusts:** both Standard and Supplemental Needs Trusts, whether funded by the beneficiary with a disability or by the family.

**Pooled Trusts:** for those with more modest resources, the GTC Third Party Pooled Trust and the GTC Self-Settled Pooled Trust.



### MISSION STATEMENT

Guardianship and Trusts Corporation was established to serve those who are unable to make informed and rational decisions for themselves regarding financial, medical and other matters of priority. Typically this involves persons with developmental disabilities, mental illness, conditions associated with age or other impairment of intellect.

# Our Programs

## GUARDIANSHIP PROGRAM

Within our **Guardianship / Conservatorship program**, service is provided to persons with disabilities who may be facing severe personal and financial loss if they are without the help of a competent fiduciary to intervene.

## TRUST PROGRAM

Within our **Trust program**, expert and caring administration service is provided to Trust beneficiaries and their families. These services may differ from the guidelines required by a larger, for-profit Trust Company.

## EXAMPLES OF CLIENTS SERVED

Guardianship and Trusts serves a variety of clients, for example:

**An elderly widow** without children experiencing increasing frailties and difficulty managing her health care and finances

**A middle-aged man** with schizophrenia, whose father managed all his affairs before his death, now left with a modest inheritance and siblings in another state

**A young woman** with developmental disabilities whose parents and grandparents want to set aside money for her future without jeopardizing Medicaid and Social Security disability benefits

**A child** affected by medical or other negligence awarded a tort settlement to manage high medical and personal expenses throughout their lifetime

GTC is devoted to empowering these individuals by acting as advocate, seeking placement in the most ideal and least restrictive environment of care as possible according to the need. We then continue to provide financial management and a range of other personal services allowed by the Courts in caring for persons who may be facing declining physical and mental health, and impending limitations such as poor living conditions, dwindling finances and social isolation.



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Regardless of the services required, our goal at **GTC** is to provide a reliable continuity of service that maximizes resources and quality of life for the client.

**Guardianship & Trusts Corporation**

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