Providing wealth management and fiduciary services to private clients and their trusted advisors.

FLEXIBLE ASSET MIXES

Private Trust Management Group accepts a variety of assets including real property, both commercial and residential.

FLEXIBLE ACCOUNT SIZES

Private Trust Management Group has no fixed upper or lower limit on the size of account it will accept. Prospective estates and accounts are reviewed individually. We carefully consider the type and mix of assets to be managed as well as the unique circumstances of the client or trust. Because we are a private company, our firm can efficiently and economically manage trusts, portfolios and asset mixes that institutional trustees are either unable or unwilling to accept.

FLEXIBLE SERVICE & FEE ARRANGEMENTS

Private Trust Management Group offers a flexible array of services and fee arrangements. In some cases we may serve as trustee or investment manager, while in others, we may act in both capacities. Our fees vary accordingly, taking into account the nature, size and complexity of the estate.

PRIVATE TRUST MANAGEMENT GROUP

Private Trustees
Investment Counsel

OVERVIEW

Private Trust Management Group provides private professional fiduciary services as well as investment counsel to trusts, individuals and the professionals who advise them.

TRUST SERVICES

Private Trust Management Group provides wealth management, investment counsel and fiduciary services to private clients and their trusted advisors. These services include serving as private trustee, executor or conservator of trusts and estates. Our core competence is working with attorneys, accountants, trustees and other fiduciaries in the administration and management of trust and estate assets.

Private Trust Management Group
936 E. Green Street, Suite 113, Pasadena, CA 91106
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Investment Advisory Services offered through
Mission Street Wealth Planning. CRD 115310

PRIVATE TRUST MANAGEMENT GROUP

Private Trustees
Investment Counsel

PATRICIA A. ALEXANDER

Patricia is a licensed Professional Fiduciary. She is also a member of the Professional Fiduciaries Association of California.

Patricia's professional experience includes almost 15 years with Hotchkis & Wiley, where she was a founding member of the international equity department, later a division of Merrill Lynch Asset Management. She has successfully passed the examinations for NASD Series 7, 63 and 66 and California insurance licenses. Patricia holds a B.M. from Mount St. Mary's College in Los Angeles.

Patricia A. Alexander
Professional Fiduciary | Investment Advisor
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Serving California from the San Gabriel Valley

PRIVATE TRUST MANAGEMENT

FIDUCIARY INVESTMENT MANAGEMENT

Professional Fiduciary Services

- Private trustee
- Successor trustee
- Co-Trustee
- Administrative trustee
- ESOP Trustee
- Conservator of the Estate
- Executor or Administrator of the Estate

Investment Counsel

- Investment management
- "Second opinions" on investment performance
- Forensic reviews
- Litigation support

MICHAEL T. ALEXANDER, J.D.

Michael brings to the firm a deep understanding of fiduciary law and practice as well as thirty-five years of legal, financial and business experience. He is a graduate of University of Southern California Law School and served in the United States Marine Corps. He resides in Pasadena and is involved in a wide range of professional, community and cultural activities.

Michael T. Alexander, J.D.
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