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Gary, Lori & Joe

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**Tell Us What You
Think!**

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best legal experience for
our clients. Review us on
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or Foursquare.*

GIVING THANKS DURING THE HOLIDAYS

We are entering that time of year where the weather cools down, the leaves begin to fall and the State Fair of Texas is underway. It is very easy to get wrapped up with routines, work, kids, school, etc. The purpose of this article is to make sure you remember to BREATHE. This can be an overwhelming time of year. Instead of focusing on the chaos and stress that the holiday season creates, make it a time to get your affairs in order, spend time with family and friends, and give thanks.

We look at the calendar and see that Halloween is quickly approaching,

Thanksgiving is not far behind, then Christmas and New Year's are right around the corner. During the next few months you may start to think about New Year's Resolutions that you have not completed. One important resolution is to make sure your family planning and estate planning are in order. Having your affairs in order will give you time to take a deep breath and enjoy the holiday season!

We are happy to help you and your family with your legal needs. Take advantage of our free consultations to get on the right track to fulfill your resolutions. ■



Why Select A Corporate Trustee To Administer Your Trust?

Article provided by: Happy State Bank

A trustee is a “fiduciary” under the law and is held to the highest standard of care when serving as a trustee and managing trust assets. This means that the trustee is expected to be knowledgeable of not only the provisions within your trust, but also trust laws that govern the trustee’s actions. There are many reasons why a corporate trustee might be a good choice as your trustee today, or in the future. The following are some of the reasons for selecting a corporate trustee:

Professional Investment Advice -

A team of trust professionals with the experience to invest your trust assets in accordance with your plan, trust laws, and also sound fiduciary principles. At Happy State Bank, the corporate trust team is comprised of a professional staff skilled in managing marketable securities (i.e. stocks, bonds), farm and ranch properties, residential and commercial properties, and minerals.

Trust Accounting –

A corporate trustee has the capability to provide each trust beneficiary with comprehensive accounting statements detailing all trust transactions, including contributions, distributions, investment performance, and market values of trust assets.

Safekeeping of Trust Assets & Confidentiality -

The corporate trustee also can safe-keep the assets for your added protection and security and also all confidential records to prevent your trust records and assets from being accessed by any unauthorized individuals. At Happy State Bank, we can ensure that your trust assets and information remains confidential and secure at all times.

Independent Decision-Maker –

For discretionary trust distributions to eligible trust beneficiaries, a corporate trustee is both unbiased and skilled in following your trust guidelines and trust laws when making discretionary distribution decisions.

Regulated & Insured –

A corporate trustee is subject to regular bank trust examinations and oversight by banking regulators. Also, a corporate trustee is required to maintain trustee liability insurance at all times. This provides an added protection to you in the unlikely event the corporate trustee commits an error while serving as your trustee.

Continuation of Trusteeship –

Sometimes a client establishes a trust to be in existence for a long period in time.

For example, a client may wish for a trust to continue for his/her children’s and/or grandchildren’s lifetimes. In these situations, a corporate trustee may provide uninterrupted service that an individual trustee cannot provide because of the possibility of death or incapacity.

Complexity of Trust Agreements & Trust Laws –

Many trust agreements have some complexities and rules that an individual trustee may not fully understand without dedicating a significant amount of time to professional training on trust administration. The Happy State Bank professional trust staff has over 200 years of combined experience in trust administration, three attorneys on staff, and is always attending continuing education courses in order to remain up-to-date on trust laws and regulations. By having a strong knowledge of trust laws, this substantially reduces the chance of an error or mistake being committed by the trustee when a corporate trustee is serving in this capacity.

For more information as to whether trust services offered by Happy State Bank and Trust Company would be beneficial to you, please contact us at any of our trust offices listed below. We look forward to visiting with you. ■



**HAPPY
TRUST COMPANY**
CREATING, MANAGING & PRESERVING WEALTH

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Amarillo, Texas 79101
Phone: 806-356-8787

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16633 N. Dallas Parkway,
Suite 350
Addison, Texas 75001
Phone: 972-934-2265

Lubbock

11007 Quaker Avenue
Lubbock, Texas 79424
Phone: 806-798-4800

Firm Events

KRLD Sandwich Generation Event



Texas Scottish Rite Hospital's Treasure Street Sponsor Event



Q & A

with Lori Ashmore Peters

Q: Why is attending Texas Scottish Rite Hospital's Treasure Street event important to you?

A: Treasure Street is an important event because my family has been close friends and neighbors with Scottish Rite for over 15 years. We are proud to support the hospital and the great things they do for the children of the community.



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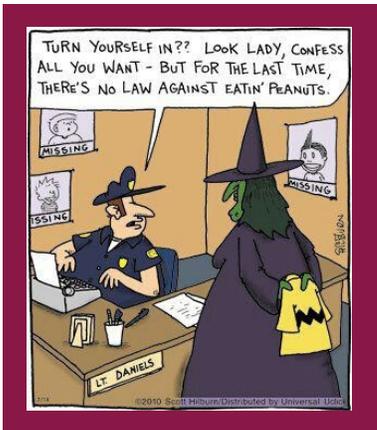
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FALL FUN FACTS



1

What do you call the season between summer & winter? Americans commonly use the word "fall" & the British use the word "autumn".



2

Scientifically speaking, pumpkins are considered a fruit.

3

The most popular Halloween candy last year in Texas was Candy Corn.



4

Thanksgiving is not just an American holiday. Canadians celebrate it the 2nd Monday in October.



5

Did you know that not all turkeys gobble? Only male turkeys, called toms, gobble. Females, called hens, cackle.



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