Your Retirement Manager

Hemenway Trust Company can manage your IRA and other retirement accounts, as well as your taxable investment accounts and trusts. Other retirement accounts might include your Roth IRA, self-employed pension plan (SEP), or a 401K that you choose to roll into your IRA.

We developed this service to respond to the evolving needs of our long-time trust clients. They wanted us to take on the investment of their retirement assets as well as their individual and trust resources. Having earned their trust through the personal attention that has become our hallmark, they wanted us to apply our investment discipline and philosophy to all of their accounts.

Now, when new clients bring us their IRA accounts to manage, they are pleasantly surprised by the level and scope of service they receive. Services include coordinating beneficiary designations with their estate plans to minimize taxes, calculating minimum required distributions, consolidating multiple small accounts into one, and more.

The Hemenway Trust Company Approach

At Hemenway Trust Company, we will structure your retirement account specifically for you, both by reviewing your goals for that particular account and by looking at the role it plays within your overall investment portfolio. Our technology allows us to gather information electronically from your other investment accounts, regardless of where they are managed, and produce a single statement showing your entire universe of holdings. This comprehensive view enables us to arrange your asset allocation appropriately.

We invest directly in individual stocks of companies that are growing their earnings and dividends, and that have clean, transparent balance sheets with sound management. Our investment philosophy is to invest in companies and products that you will understand. Absent compelling reasons, we would not typically invest your retirement accounts in hedge funds or alternative investment products. You will know what you own and you will understand the business of each company we hold.

The tax-advantaged nature of retirement accounts allows us to move out of an investment more quickly than we may choose to do for a taxable account, but we remain committed to investing for the long term. We also complement our equities with a ladder of highly rated corporate bonds and government paper.

Contact Us

Whether you need investment services for a particular account, such as an IRA, or you are looking for a more comprehensive suite of investment and trustee services, please contact Hemenway Trust Company at (603) 913-8022 to learn more.

www.hemtrust.com

Hemenway Trust Company LLC