



59th Annual Heckerling Institute on Estate Planning

Why Comerica.

Our client-centric approach surrounds clients with a team of experienced specialists, each dedicated to working closely with you to provide the right solutions for your clients' specific needs, goals and priorities delivered through the concierge-style service they deserve.

Big enough to matter - small enough to care.

Comerica Incorporated (NYSE: CMA) is a financial services company headquartered in Dallas, Texas, and strategically aligned by the Commercial Bank, the Retail Bank, and Wealth Management. Comerica's approximately 7,800 colleagues focus on relationships, and helping people and businesses be successful.

In addition to Texas, Comerica Bank locations can be found in Arizona, California, Colorado, Delaware, Florida, North Carolina, Michigan, Minnesota and New York with select businesses operating in several other states, as well as in Canada and Mexico.

The Team

Comerica's integrated team serves the diverse needs of high-net-worth individuals and their families, business owners, corporate professionals and non-profits by providing tailored solutions to complex issues around managing wealth.

Scan the QR code to meet the Team.



Stay informed.

Subscribe to receive insightful content and commentaries from Comerica's team of thought leaders.

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Comerica Wealth Management consists of various divisions and affiliates of Comerica Bank and subsidiaries of Comerica Bank including Comerica Insurance Services, Inc. and its affiliated insurance agencies. Comerica Bank is an Equal Opportunity Lender. Securities and other non-deposit investment products are not insured by the FDIC, are not deposits or other obligations of, or guaranteed by, Comerica Bank or any of its affiliates, and are subject to investment risks, including possible loss of the principal invested. Comerica and its affiliates do not provide tax or legal advice. Please consult with your tax and legal advisors regarding your specific situation.

How we deliver.



Since 1849, Comerica has been raising the expectations of what a bank can be by delivering a higher level of service and solutions that nurtures lifelong relationships. As a regional bank, Comerica occupies a unique niche within the financial industry, combining a number of “big bank” products and services, but with a more localized and personalized touch. See how, scan the code.



Leader In Fiduciary Solutions

We are proud to be both a pioneer and a leader in providing agnostic, flexible investment strategies to meet the growing demands of sophisticated clients with multi-generational needs. [See why.](#)



[2024 Year-End Planning Guide](#)

The Comerica Wealth Management 2024 Year-End Planning Guide offers expert insights and actionable strategies for individuals and business owners looking to maximize their financial and tax planning strategies. [Download the Guide.](#)



Benefits of Working with a Corporate Trustee

A corporate trustee like Comerica offers experienced and knowledgeable professionals who manage trusts as part of their day-to-day responsibilities, providing the level of expertise required to ensure that the wishes of the grantor are carried out in the most effective way possible. [Find out how.](#)



[Business Transition Planning](#)

As leaders in business transition planning, Comerica is uniquely positioned to provide deep expertise to help transition business ownership and maximize generational wealth. We see our experienced team and our services to business owners as a key differentiator for our clients. [Find out more](#) about our dedicated, nationwide team.



Special Needs Trusts

Proper financial planning for individuals with special needs can enable a comfortable lifestyle for loved ones without compromising their eligibility for government benefits. [Read how.](#)



Specialty Financing

Our experienced wealth team has decades of experience helping clients navigate high-net-worth purchases like aircrafts and yachts. See how we can help navigate the complex financing journey. [Yacht Financing](#), [Aircraft Financing](#)



Specialty Asset Management

Comerica’s national team is dedicated to the management of closely-held businesses, real estate, oil and gas and other specialty assets. [See how.](#)



Estate Planning for Carried Interests

Planning with carried interest can be complicated. The professionals at Comerica can help tailor strategies to individual circumstances and goals. [Read more.](#)