

ADVISORS WHO

OFFER TRUST

SERVICES CAN ADD

SIGNIFICANT ASSETS

TO THEIR PRACTICES.

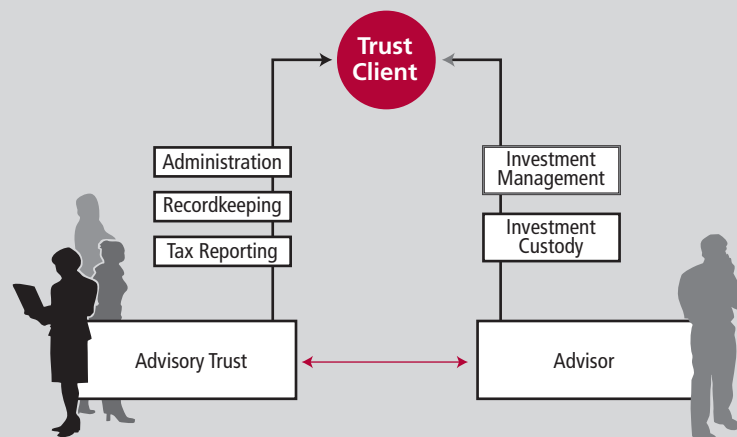
Financial advisors know that when the subject of estate and trust planning comes up, there is a real risk of losing the client to a traditional trust provider. For some advisors, that means not approaching the subject—until it's too late.

Now, advisors have an alternative—
The Advisory Trust Company of Delaware.

Advisory Trust offers brokers, financial planners, registered investment advisors, and family office practices world-class trustee and trust administration services. Even more, Advisory Trust allows advisors to keep managing the assets—even when those assets go into the client's personal trust.

Advisory Trust is different from traditional trust providers because we do not provide investment management services. Nor do we custody the assets in the trust. Both investment management and custody remain with the advisor. This unique way of offering trust services allows the advisor to offer Advisory Trust's trustee services that complement the advice, investment management, and financial planning services that advisors provide to their clients. And, advisors who offer trust services from Advisory Trust know that their clients will be treated with the same care that they provide in their own practices.

Advisory Trust provides all of the services of a traditional trust provider, with the added benefit of keeping the advisor as the main point-of-contact for financial services. Our services include trust administration, distribution services, and tax reporting services—each service expertly performed by an experienced trust professional.



TRUST ADMINISTRATION SERVICES

- Trust Administration and Recordkeeping
- Ongoing Investment Review
- Distribution Services
- Beneficiary Payments as Required
- Fiduciary Tax Return Preparation
- Quarterly Trust Statements

HOW ADVISORY TRUST COMPANY CAN WORK FOR YOU

Advisory Trust provides trustee services for most kinds of trusts. Whether your client is a beneficiary of a trust, or is thinking about setting up a trust, The Advisory Trust Company of Delaware will be happy to discuss your particular situation. Just call the toll-free number and tell us about you, your practice, and your client. If Advisory Trust makes sense in your situation, you will need to provide us with a copy of the trust, or in the case of a new trust, the name of the attorney preparing the document.

The Advisory Trust Company of Delaware does all the work in setting up the trust. However, depending on the complexity of the trust, and whether assets are already in place at another trust provider, transferring the assets to you and your custodial provider can take anywhere from two weeks to two months to complete. We'll keep you and your client advised of progress. And, we're always happy to hear from you or your client whenever you have questions.

ABOUT ADVISORY TRUST

Advisory Trust is part of the Wilmington Trust corporate family, which has been in the wealth management business for 105 years, serving as trustee and advisor for prominent individuals, families, and foundations. Founded in Wilmington, Delaware, in 1903 by T. Coleman du Pont, one of the great industrialists and entrepreneurs in our nation's history, the Wilmington Trust corporate family currently serves wealth advisory clients in all 50 states and 36 countries.

Advisory Trust has offices in Wilmington, Delaware, and Phoenix, Arizona, and currently oversees approximately \$1.3 billion in assets for more than 1,200 personal trust accounts, providing tax and administration services.

To speak to a trust professional about any of our services, please call 800.258.6334 or send an email to: inquiries@advisorytrustco.com.

ADVISORY TRUST

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