

The Advisory Trust Company of Delaware (Advisory Trust) provides directed trustee, trust administration, and back-office services for high-net-worth individuals and families. We work exclusively with professional advisors, assisting them in helping their clients achieve their financial goals by using the full range of trust strategies available under Delaware law.

The Advisor consults with the client to identify long-term vision and goals.

- Discuss client-centered team approach and how to best accomplish the client's goals.
- Educate client and other advisors about Advisory Trust.
- Contact Advisory Trust to discuss the details about the proposed trust(s).

The attorney drafts the trust for the client.

- Name Advisory Trust as the trustee.
- Designate Trust Protector and Investment Advisor, as appropriate.

All parties work together to finalize the trust.

- Meet with client to explain details and answer questions.
- Provide the documents to Advisory Trust to review for acceptance.
- Work with Advisory Trust to establish an Investment Policy Statement for the Trust.
- Execute the trust documents.
- Transfer assets to the Trust and register them as

“The Advisory Trust Company of Delaware, Trustee FBO Name of Trust”

Advisory Trust stands ready to provide you with the tools and information you need to meet the trust goals of your clients. Our job is to help you take advantage of one of the most trust favorable states in the nation—The First State—Delaware.

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.

Trusted Solutions.

The Advisory Trust Company of Delaware

2710 Centerville Road, Suite 101
Wilmington, Delaware 19808
800.258.6334

2800 North Central Avenue, Suite 900
Phoenix, Arizona 85004

www.advisorytrustco.com

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