ARDEN TRUST
COMPANY

WHY ARDEN TRUST

Top three reasons why a financial advisor should get involved with trusts.

1	**Capture a greater % of client assets**	If your client is the beneficiary of a trust established for his/her benefit, Arden Trust can work with you to transfer the trusteeship of the trust from a bank trust department to Arden Trust and onto your book of business.
2	**Capture new assets**	A transfer of wealth is currently taking place from the Greatest Generation to the Baby Boomers of more than $12 trillion in assets.[1] A second and even larger wealth transfer, estimated at more than $30 trillion in financial and nonfinancial assets, will continue over the next 30-40 years from the Boomers to their heirs.[1] Arden Trust can provide you with trust strategies to capture some of this transfer of wealth.
3	**Protect your current revenue stream**	About 86% of heirs intend to fire the advisor used by their parents once they inherit the wealth.[2] An advisor must add four new accounts to compensate for the revenue loss when an account leaves a firm through a generational transfer. By naming Arden Trust as successor trustee in your client's estate planning documents we can help you ensure retention of those assets.

Why should a client use a corporate trustee?

Impartiality	Responsibility	Continuity	Reporting
A corporate trustee is not influenced by family relationships and can make discretionary trust decisions without jeopardizing personal family relationships.	A corporate trustee is regulated and regularly examined by a state or federal agency.	A corporate trustee will provide continuous, consistent administration for the entire term of the trust.	A corporate trustee uses systems and processes for timely, accurate and compliant reporting of all trust activity.

Why Arden Trust?

Advisor Friendly	Rated by The Wealth Advisor as one of America's most advisor-friendly trust companies.
Skills & Experience	Our personal trust officers average more than 20 years of industry experience.
Personal Service	Retains the model of one-to-one trust officer to client relationships. We do not operate a call center.
Competitive Fees	Promotes value over price in delivering our services. Our fees are reasonable and are based solely on our administrative duties; investment fees are charged by your firm.
Focus	Only provides trust services. We do not offer loans, deposits, mortgages or any other financial services that would distract us from our primary mission of providing the highest quality fiduciary services to you and your clients.

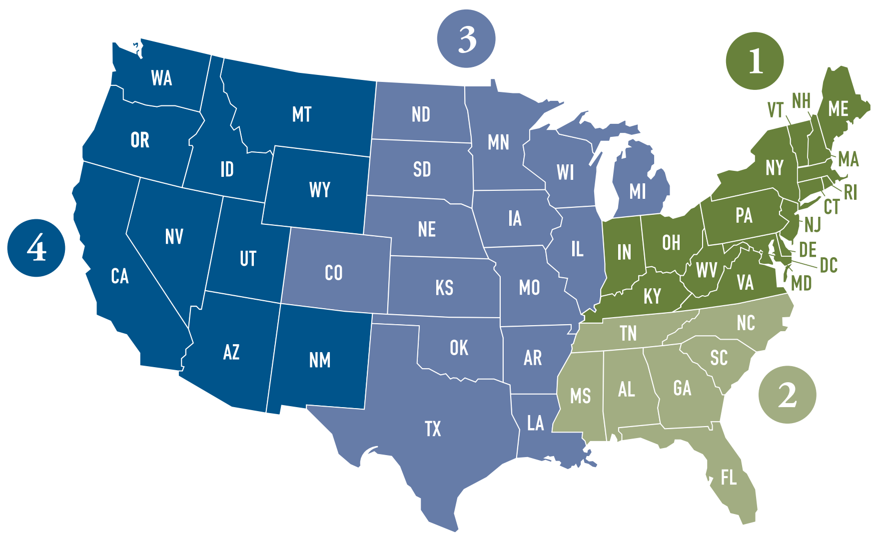
1 Source: Millionaires and the Millennium: New Estimates of the Forthcoming Wealth Transfer and the Prospects for a Golden Age of Philanthropy. Social Welfare Research Institute at Boston College. By John J. Havens and Paul G. Schervish. 1999.

2 Source: Rothstein Kass study. Jan. 2009.

ARDEN TRUST COMPANY

FINANCIAL ADVISOR COVERAGE MAP

- For all new opportunities including successor trustee language and future fee business, contact the sales executives at the numbers below.
- For all Special Needs Trusts, contact **Shavon Martin** at **480.666.9791** or **shavon.martin@ardentrust.com**



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Aaron Henry	310.502.7757	aaron.henry@ardentrust.com	2, 4

CONTACT AN OFFICE NEAR YOU TODAY

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