ARDEN TRUST
COMPANY

PROFESSIONAL TRUST & FIDUCIARY SERVICES

TRUST SERVICES WITH A HOLISTIC PERSPECTIVE

Your Legacy. Our Duty.

As a professional financial services provider, you work hard to provide the necessary recommendations, services and financial advice your clients deserve. At some point in your client relationships, you or your client's attorney may have drafted family estate plans and/or wealth transfer documents.

In the past, these plans may have created a wealth transfer to a bank trust department taking that family relationship away from you or your firm. But thanks to a unique relationship crafted by Arden Trust, you no longer have to lose these family relationships when a trust relationship becomes more appropriate for your client's financial circumstances.

With Arden Trust as the trust administrator, you can continue to serve as the investment advisor keeping the relationship intact and allowing you to service future family members.

Arden Trust has offered this type of joint coverage to financial professionals associated with major financial services companies for many years. Our seasoned administrative professionals are comfortable working with both advisors and clients across the United States and are available to answer any trust questions you may have.

If you have previously lost a family trust relationship to a bank trust department, let Arden Trust assist you in reacquiring the position of trusted financial advisor.

Together we can form a strong, lasting partnership that will help you grow and sustain those family trust relationships.

World-class Trust Services

Arden Trust has a strong tradition of providing world-class personal trust services both directly to beneficiaries and in partnership with financial advisors and other trustees.

Arden Trust has a unique tradition of allowing you and your clients to maintain your professional advisors such as attorneys, financial planners and CPAs after assets have moved into a trust. We know the importance of these life-long, multigenerational advisor relationships and work closely with many of our clients' advisors.

Trust Services include:

- Irrevocable Trusts
- DE Directed Trusts
- Charitable Remainder Trusts
- Special Needs Trusts
- Irrevocable Life Insurance Trusts
- Estate Settlement

Why Arden Trust Company?

Arden Trust provides personalized service - one client, one trust officer

Arden Trust utilizes a reporting and accounting platform that supports both your custody platform and all assets that will go into the trust

Arden Trust is your resource for all types of trust and fiduciary services from standard marital and residual trusts to irrevocable trusts

Arden Trust allows independent financial advisors to maintain their relationships with families when assets move into a trust

Arden Trust personal trust administrators average more than two decades of experience in trust administration

Arden Trust is an open-platform provider of investment services with no proprietary products

Arden Trust is a leading provider of fiduciary services for irrevocable life insurance trusts (ILITs)

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For more information about Arden Trust Company and how our personal trust services can help you and your clients,

CONNECT WITH OUR SALES TEAM

www.ArdenTrust.com/Sales-Team

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