# CORIENT TRUST SERVICES

As part of our ongoing effort to exceed your expectations, we are pleased to offer you corporate trustee services through Corient Trust Company LLC—a South Dakota chartered trust company primarily operating in a directed trust model, enabling your wealth advisor to manage your trust's assets.

## Why Directed Trusts?

With a directed trust, you maintain the ability to customize the trust instrument to your distinct family, investment and estate plan needs while allowing you to retain your investment advisor. Additionally, these trusts can:

Limit personal liability

Hold many types of assets, traditional or unique

Be integrated into your holistic wealth plan

## Why South Dakota?

Just like with real estate, a key to trust administration is location, and South Dakota rates high among its peers for good reason. Here are just a few of the advantages a South Dakota situs trust offers:

- **Duration:** Unlimited durations for Dynasty Trusts and Purpose Trusts.
- **Privacy:** Strong privacy statutes and flexibility to create quiet trusts.
- **Protection:** Multiple layers of trust asset protection.
- **Taxes:** No state gift, inheritance or GST tax and no state income tax on trust growth.
- **Simplicity:** Ability to modify or amend trusts without judicial involvement.
- **Experience:** Leverage our experts in South Dakota to help meet your complex needs.

**To learn more about Corient Trust Services and how we can help you, please contact your Corient Wealth Advisor.**

**The choice of trust situs is a complex decision that involves various legal, financial, tax and personal considerations. Corient recommends that you consult with your CPA and attorney to identify the best jurisdiction for your individual situation.**