CORIENT

WHY CORIENT TRUST COMPANY?

At Corient, we lead with planning. We launched Corient Trust Company, LLC (CTC) to ensure that the estate planning we recommend is seamlessly integrated and executed—supporting our mission to exceed client expectations, simplify client lives, and build enduring legacies. The failure to execute well can have dire consequences for our clients and their families. Over 400 clients and advisors have recognized that **Corient has redefined what it means to manage a trust** and have availed themselves of CTC's unique offering resulting in better client service and augmenting client retention.

Please join several Corient advisors' sharing real-life experiences and success stories using CTC: *Building "Trust" with Our Clients*.

Other helpful internal materials for reference: *Trust Primer* and *Parrothead Pitfall: Choosing the Wrong Trustee Can Be Costly*.

For Wealth Advisors

Expand Your Practice, Retain Assets, Grow Relationships and Provide a Competitive Advantage. CTC empowers Wealth Advisors to:

- **Retain control**: As the advisor, you continue managing investments under a directed trust structure.
- **Gain & preserve AUM**: CTC can act as current or successor trustee—keeping assets in your book and preventing them from walking out the door when a client passes. Refer to internal material: *Real Life Case Study on Preserving Relationships and Control*.
- **Deepen relationships**: Expand wallet share and establish multigenerational connections.
- **Differentiate your practice**: Provide a cutting-edge trust solution with tax, privacy, and asset protection benefits not available in other states. Refer to internal materials: *12 Powerful Reasons South Dakota is America's #1 Trust Jurisdiction* and *Forget Delaware: South Dakota is the Real Trust Powerhouse*.

How It Works

1. CTC team will assist with updating trust documents using Corient's approved language.
2. Advisor manages the investments, growing AUM and staying at the center of the relationship.
3. CTC handles administration, reporting, and compliance.
4. Client's CPA or Corient Tax Services prepares and files tax returns.

How CTC is Paid

Future appointment

This is a complimentary service. We will assist clients with writing CTC into the document and there are no fees until CTC becomes the trustee. Refer to internal material: *Real-Life Case Study on Preserving Relationships and Control.*

Current appointment

Based on Published Fee Schedule. This additional AUA is applied to advisor compensation programs.

Start the Conversation

- Ask every prospect and client about their estate plan. Refer to internal material: *Guide to Recognizing Referrals*.
- Invite the CTC Team to help with conversations, answer questions or assist in any way.

Supporting Materials Available:

Client-facing: Introducing Corient Trust Services

Advisor-use only:

- 12 Powerful Reasons South Dakota is America's #1 Trust Jurisdiction
- Forget Delaware: South Dakota is the Real Trust Powerhouse
- Real-Life Case Study on Preserving Relationships and Control
- Parrothead Pitfall: Choosing the Wrong Trustee Can Be Costly
- Trust Primer: The Importance of Trust Administration
- Guide to Recognizing Trust Referrals
- Published Fee Schedule

Need Help?

The Corient Trust Team is ready to support your conversations and client onboarding. Please reach out to **Heather Pesikoff**, Head of Trust Services or Trust@corient.com.