

# Trust Services for *YOUR* Clients... Made Easy

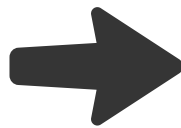
By partnering with Advocacy Trust, you can easily give your clients the many benefits of trust services without the risk or high cost of doing it yourself.

Advocacy Trust respects your relationship with your customer, and as a non-competitive subcontractor, your company always remains in full control of your client relationship.

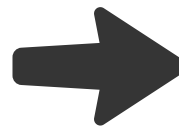
Leveraging Advocacy Trust enables you to quickly add an important service for your clients, tapping into a new revenue stream with no start-up costs, no regulatory issues to wrestle, and less lead time to market.



Advocacy Trust  
Team



Financial  
Advisor



Trust  
Client

## **WE SUPPORT YOU!**

We provide value-added services: traditional trusts, asset protection, and special needs and settlement trusts

## **THEY'RE YOUR CLIENTS**

You provide the strategic advice, relationship management, financial planning, and investment management

## **WHY CLIENTS NEED TRUSTS**

Trusts provide an excellent way to both preserve wealth and transfer it to their heirs, charities, or more

## Trust Services for Your Business

Trusts allow a reason and a vehicle to consolidate all of a client's wealth under a single RIA relationship, all while increasing your business revenue. Specifically:

- Expand your service offerings to increase client retention as well as new clients
- Create a bridge for heirs to be multi-generational clients
- Provide continuity of family governance, even with the client's absence or incapacity

## Trust & Estate Planning

An estate plan can prevent financial and legal grief to a client's loved ones, while avoiding complications, disagreements, and bitterness within the family. Leveraging a trust:

- Offers a holistic approach to estate and life planning
- Mitigates estate and transfer taxes
- Makes life easier with services like paying bills and property management
- Keeps your estate private instead of becoming public record
- Provides quick distribution of assets while avoiding probate

## Asset Protection

Clients or beneficiaries who work in high risk professions or have high credit exposure can benefit from an asset protection trust. A trust can provide protection from:

- Irresponsible Spending
- Multiple marriages with stepchildren or married children with no prenuptial agreements
- Elderly clients with a family history of dementia or Alzheimer's

**70% of wealthy families lose their wealth by the second generation**

Source: NASDAQ - Personal Finance - 10/19/18

## Philanthropy

**More than half of all American adults do not have a will or trust**

Source: US New & World Report - 7/14/17

Trusts can be used to create unique philanthropic opportunities that provide a positive impact on society, including:

- Leaving a legacy of charitable giving both before and after death
- Savings your heirs estate and gift taxes
- Creating ongoing tax deductions, while avoiding capital gains taxes on contributed assets

## Disabled Individuals

Third-party Special Needs Trusts ensure that a disabled family member is able to retain their public assistance and disability benefits such as Social Security, Supplemental Security Income, Medicare, or Medicaid. Through a trust, we help beneficiaries and their families:

- Navigate the complex rules surrounding government benefits, enabling them to maintain public assistance
- Meet cash flow needs now and into the future
- Add to the richness of life by using the trust assets for education, recreation, and other life enhancements

**On average, the retention rates for a trust account is 30-50% longer than an investment management account**

Source: WISE - 2019 Performance Assessment - IM & Trust

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