

ADVISOR TRUST SERVICES

America's most advisor-friendly trust companies

BOK Financial was named as one of America's most advisor-friendly trust companies by leading industry source, Wealth Advisor. Wealth Advisor is a leading source of news, commentaries and education to wealth managers and advisors. They publish a yearly report outlining the top trust companies that cater to registered investment advisors (RIAs), family offices and broker-dealer representatives.

In its 2023 report, Wealth Advisor named BOK Financial as one of the most advisor-friendly trust companies. Criteria for the listing was based upon technology, custodians, fees, in-house experts, advisor support, and more. 2023 marks the 9th time that BOK Financial has been named a top advisor-friendly trust company by Wealth Advisor.

FOR MORE INFORMATION, CONTACT:

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WHAT SETS US APART?

- Nationally chartered and able to serve advisors and their clients in all 50 states.
- A strong commitment to personalized and responsive service through experienced professionals.
- Administration of directed and delegated trusts as a sole or co-trustee.
- Expertise in administering personal trusts, special needs trusts, court created trusts, charitable trusts and may serve as agent for trustee.
- Ability to manage assets in complex estates: real estate, oil and mineral management, closely held, farmland, etc.



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NOT FDIC INSURED | NO BANK GUARANTEE | MAY LOSE VALUE

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