

ADVISOR TRUST SERVICES

For Attorneys and their Clients

Your clients likely have a preferred financial advisor they would like to remain in place upon their death or incapacitation. BOK Financial Advisor Trust Services exists exclusively to accommodate this wish while fulfilling the duties of a professional fiduciary by acting as trustee or successor trustee.

Significance of Trust and Estate Planning

At BOK Financial Advisor Trust Services, we recognize the critical and complex role you play in meeting your clients' financial planning and wealth transfer needs. Our platform, along with the thousands of independent advisors, broker/dealers, and custodians we partner with across the country, can provide the expertise and resources necessary for successful trust and estate planning.

Choose a Professional Trustee

Selecting a friend or family member as your client's successor trustee may not always be an available or ideal solution. Most individuals lack the time, expertise and resources to serve as trustee. Given the extreme burden associated with the responsibilities and liabilities involved, many estate planning attorneys turn to a corporate trustee as a prudent and flexible alternative. BOK Financial Advisor Trust Services can serve as the trustee or co-trustee in these situations, partnering with your client's preferred investment advisor to ensure their wishes are carried out.

Our experienced team will be there with the skill, knowledge and capabilities to fulfill the trustee's duties—all delivered with a level of personal attention and service we believe is unmatched in the industry.

Providing Flexibility and Choice for your Client

Our "Advisor Friendly" business model empowers your client and their families to continue working with their preferred investment advisor upon incapacitation or death. Unlike traditional corporate bank/trust companies, we support the bifurcation of investment management from trust administration. Our suggested language for Delegated and Directed trusts allows your clients to memorialize their preferred advisor relationship in their estate planning documents.

What sets us apart?

- Nationally chartered and able to serve clients in all 50 states.
- Clients maintain a close relationship with their trusted financial advisor, who will manage trust assets and remain the primary point of contact for the family.
- Committed to providing personalized and responsive service through dedicated and experienced professionals with no impersonal "call centers."
- Serve as the sole or co-trustee for personal trusts, special needs trust, court-created trusts, charitable trusts and may serve as agent for trustee.
- Expertise in administering complex assets in trusts and estates, including real estate, oil and mineral management, closely-held, farmland, and more.



FOR MORE INFORMATION, CONTACT:

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