

# Personal trust services

**You and your family likely have a preferred financial advisor you would like to remain in place upon your death or incapacitation. BOK Financial Advisor Trust Services exists exclusively to accommodate this wish while acting as trustee or successor trustee for your estate plans.**

## Choose a professional trustee

Naming a friend or family member as your successor trustee may seem like a simple solution, but often it may not 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, selecting a corporate trustee may be a better alternative.

A corporate trustee has the expertise to oversee all of the legal and fiduciary requirements needed and will be impartial and unaffected by family dynamics that may be challenging for an individual, friend, or family member. What's more, the cost associated with selecting a corporate trustee may be less than you expect. Consider BOK Financial for the role of trustee to partner with your preferred investment advisor. 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.

## Key responsibilities of your trustee

Choosing a trustee is a critical decision in estate planning. It's crucial your designee understands and can perform the important—and often complex—responsibilities of a trustee, such as:

- Making distributions as outlined in the trust document.
- Properly accounting for all assets and transactions in compliance with federal regulation and state law with periodic statements to required parties.
- Reviewing and filing all required income tax returns.
- Implementing fiduciary duties by remaining impartial toward the beneficiaries, loyal to the trust, prudent with regard to investment management and accountable to the beneficiaries.

### *What sets us apart?*

- Nationally chartered and able to serve clients in all 50 states.
- Maintain a close relationship with your trusted financial advisor while they manage your trust assets and remain the primary point of contact for you and your beneficiaries.
- A strong commitment to personalized and responsive service through dedicated and experienced professionals with no impersonal "call centers."
- Administration of personal trusts as sole or co-trustee.
- Expertise in administering personal trustee, special needs trust, 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.



### FOR MORE INFORMATION, CONTACT:

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