

Company overview

At BOK Financial Advisor Trust Services, we enhance the advisor-client relationship by providing objective trust administration solutions, while financial advisors deliver comprehensive investment management services with the flexibility of managing and holding trust assets with their preferred custodian.

ADVISOR TRUST SERVICES

BOK Financial Advisory Trust Services offers a dedicated department with experienced trust officers to support advisors and their clients. With an emphasis on personalized and responsive services, we take the time to develop valuable long-term relationships.

Our trust services can help you focus on what's most important — your clients. As you work with them to create a solid financial foundation, we'll partner with you to deliver what they need.

BOK FINANCIAL

Our trust services are backed by BOK Financial Corporation® (NASDAQ: BOKF), a diversified and prominent leader in the U.S. financial services industry. BOKF is headquartered in Tulsa, OK, with more than 200 locations nationwide.



**NATIONALLY CHARTERED &
ABLE TO SERVE IN ALL 50 STATES**



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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[BOKFINANCIAL.COM/ADVISORTRUSTLIBRARY](https://www.bokfinancial.com/advisortrustlibrary)

BOK Financial® is a trademark of BOKF, NA which operates as Bank of Albuquerque, Bank of Oklahoma, Bank of Texas and BOK Financial. BOK Financial Corporation (BOKF) offers wealth management and trust services through various affiliate companies and non-bank subsidiaries, including advisory services offered by BOKF, NA and its subsidiaries BOK Financial Asset Management, Inc. and Cavanal Hill Investment Management, Inc., each an SEC registered investment adviser. BOK Financial Corporation offers additional investment services and products through its subsidiary, BOK Financial Securities, Inc., a broker/dealer, member FINRA/SIPC, and an SEC registered investment adviser and BOK Financial Private Wealth, Inc., also an SEC registered investment adviser.

NOT FDIC INSURED | NO BANK GUARANTEE | MAY LOSE VALUE

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