



## PRIVATE LABEL U.S. FIDUCIARY SOLUTIONS

ENHANCE AND EXPAND YOUR ESTATE PLANNING SERVICES WITH OUR BESPOKE U.S. CORPORATE TRUSTEE SOLUTIONS FOR INVESTMENT MANAGEMENT AND BROKERAGE FIRMS, FAMILY OFFICES, INSURERS AND BANKS. YOU CAN FOCUS ON CLIENT RELATIONSHIPS, WHILE WE HANDLE ADMINISTRATION, OVERHEAD COSTS, AND FIDUCIARY LIABILITY.

### ADVANTAGES

Why partner with Trident for a Private Label Solution?

- > Minimal cost
- > Go to market in 45-60 days
- > Deep knowledge base
- > Flexibility in demand
- > No additional regulations
- > Privately held, placing your firm first
- > Expand your brand awareness
- > Maintain your current custodians

### OUR ROLE

Your firm can fully define and control the entire client experience, customizing Trident's role to the client:

- > We act as the trustee and back office with client interaction based on your firm's delivery model.
- > Trident and your firm can work in tandem as a joint-client facing solution.

### TRUST COMPANY

If desired in the future, your firm will have the flexibility and optionality to seamlessly create your own trust company by acquiring a charter and leveraging Trident for a similar set of services.

- > Our experienced staff can continue to be the back office for the new trust company.
- > We can provide South Dakota situs, with no requirement to move or add firm staff to a separate jurisdiction.

### OUR SERVICES

We can adjust our services to your needs and/or existing service offerings. Standard services include:

- > Trust administration
- > Principal and income accounting
- > Organization and review of fiduciary/personal tax returns
- > Extension of your fiduciary offerings

### OUR OFFICE

Ranked as one of the leading trust companies in South Dakota in the respected Chambers & Partners High Net Worth Guide, every year since 2016, our experienced, qualified team in Sioux Falls provides a wide range of fiduciary and corporate services to professional advisors and their high net worth clients, both international and U.S. based.

### CONTACT

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- ▶ PEOPLE LED
- ▶ TECH ENABLED
- ▶ GLOBAL COVERAGE
- ▶ TAILORED SERVICE

- ▶ 1,100 STAFF
- ▶ 25 JURISDICTIONS
- ▶ 47,000 ENTITIES
- ▶ \$177BN AUA

- ▶ FUNDS
- ▶ PRIVATE CLIENTS
- ▶ CORPORATE CLIENTS
- ▶ MARITIME

TRIDENTTRUST.COM