

WHAT IS AN ADVISOR FRIENDLY TRUST?

An Advisor Friendly Trust is a trust where the administrative duties and the investment management duties are separated. Capital First Trust Company serves as the trustee and administrator. The responsibility for investing the trust's assets lies with the investment advisor.

Financial advisors and investment managers dedicate their time and talents to developing trusting relationships with their clients, guiding them through life events and the important financial decisions that come with them. At Capital First, we recognize the depth of this relationship and seek to facilitate the advisor/client partnership with our Advisor Friendly Trusts in which we serve as the independent corporate trustee.

O P E N A R C H I T E C T U R E

GRANTOR OR INCOME BENEFICIARY

TRUSTEE APPOINTMENT DOCUMENT

