

WHAT IS AN ADVISOR DIRECTED TRUST?

An **Advisor Directed Trust** is a trust where the administrative duties and the investment management duties are separated. A **Directed Trustee** 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. **Directed Trustees** recognize the depth of this relationship and seek to facilitate the advisor/client partnership with Advisor Directed Trusts.

OPEN ARCHITECTURE

GRANTOR OR INCOME BENEFICIARY

TRUSTEE APPOINTMENT DOCUMENT

