

About Cornerstone



WHO WE ARE

Cornerstone Private Asset Trust Company, LLC, a boutique trust company, helps clients implement their estate planning goals and transition wealth from one generation to the next. We provide services above and beyond those of a traditional trust company by focusing on the uniqueness of each client, and their long-term goals.

A PREMIER TRUST JURISDICTION

Being established as a trust company in South Dakota provides additional advantages, including:

- No state income tax on income, capital gains, dividends, interest, intangibles or other income
- Unlimited trust duration
- Self-settled asset protection trusts
- Some of the best privacy statutes for trusts in the United States
- Modern trust laws that allow for directed and delegated trusts
- Flexibility and control over, or input on, investment and distribution decisions
- An efficient and cost-effective process for trust modification, reform, decanting, and virtual representation

TRUST SERVICES

As an independent public trust company, we provide many services other trust companies will not. We can serve as trustee for any type of trust, including:

- Irrevocable trust
- Asset protection trusts
- Revocable living trusts
- Dynasty trusts
- Trusts under wills
- Life insurance trusts (ILIT)
- Charitable trusts

We can also serve as the agent for individual trustees, as conservators to perform administrative duties for those unable to manage their own affairs, or as personal representatives and executors of estates.

INVESTMENT MANAGEMENT

We offer two options for the investment of trust assets:

- Delegated – We are able to delegate the investment management to a trusted advisor. This arrangement allows the advisor to maintain control of the client relationship and continue managing the client assets. The advisor is also able to continue operating on their preferred trading platform.
- Hire Us – We can act as the client's investment advisor if they do not have one. We work with the client to create a custom portfolio that meets the needs, goals and objectives of current and contingent trust beneficiaries.

ADMINISTRATIVE TRUSTEE

The role of the corporate trustee is to oversee and administer the assets of the trust as directed in the governing trust-document. In this role, we perform a broad range of functions, including:

- Maintain detailed records on all trust activity
- Provide regular reporting to the trust interested parties
- Review the trust assets to ensure they are invested properly
- Annual review of trust administration and investment activities
- Provide tax reporting and ensure tax returns are filed each year
- Provide comprehensive education for beneficiaries on the financial resources set aside in trust for their benefit



Cornerstone
PRIVATE ASSET TRUST COMPANY, LLC

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