EVERCORE | Wealth Management
Trust Company

THE NEW STANDARD IN WEALTH MANAGEMENT

Personal Trust and Fiduciary Services at Evercore

Evercore provides families across the United States with a modern alternative to traditional trust companies. We strive to set a new standard in trust and family wealth services, reflective of our experience and the Evercore culture of personal and institutional integrity.

Our senior professionals work directly with grantors, beneficiaries, and their other trusted advisors to deliver innovative, timely, and flexible planning and trust solutions.

WE HELP ESTABLISH, MANAGE, AND ADMINISTER AN ARRAY OF CUSTOMIZED TRUSTS, INCLUDING:

- Charitable Trusts
- Delaware Asset Protection Trusts
- Delaware Directed Trusts
- Delaware Dynasty Trusts
- Generation-Skipping Trusts
- Private Foundations
- Revocable and Irrevocable Trusts
- Special Needs Trusts
- Special Purpose Trusts
- Testamentary Trusts

WE ALSO PROVIDE PROFESSIONAL FAMILY WEALTH AND TRUST MANAGEMENT SERVICES:

Family Wealth Services

- Strategic Wealth Planning
- Philanthropic Management
- Centralized Financial Administration
- Comprehensive Wealth Reporting
- Family Governance
- Private Wealth Education

Trust Management Services

- Investment Management
- Asset Allocation
- Custody and Safekeeping of Assets
- Tax Reporting
- Exercise of Discretion
- Estate and Trust Settlement

WE CAN SERVE AS EXECUTOR, PERSONAL REPRESENTATIVE, SOLE TRUSTEE, CO-TRUSTEE, DIRECTED TRUSTEE, SUCCESSOR TRUSTEE, OR AGENT FOR TRUSTEE. WE STRIVE TO REALIZE THE GOALS OF THE GRANTORS AND MAINTAIN THE WELL-BEING OF THE BENEFICIARIES.

A Culture of Integrity

A NATIONAL WEALTH MANAGEMENT FIRM

Evercore Wealth Management, LLC ranks among the top 10% of U.S. registered investment advisors[1] based on assets under management.

www.evercorewealthmanagement.com

A NATIONAL TRUST BANK

Evercore Trust Company, N.A. is a national trust bank with the authority to serve as a corporate trustee and executor throughout the United States.

www.evercoretrustcompany.com

A DELAWARE STATE CHARTERED TRUST COMPANY

Evercore Trust Company of Delaware offers clients access to the tax and regulatory advantages associated with Delaware Trusts.

www.evercoretrustcompanyofdelaware.com

Together we serve families across the United States, providing asset allocation, portfolio management, manager due diligence, strategic wealth planning, generational wealth transfer advice, fiduciary services, and private wealth education. We are committed to meeting our clients' financial goals and sustaining their trust.

We value transparency in all of our dealings. We have a simple fee structure and, in contrast to many large corporate trustees, we do not charge an additional fee for working with co-trustees or co-executors.

Working with Evercore

DIRECT RELATIONSHIPS WITH EXPERIENCED PROFESSIONALS

Our senior wealth and fiduciary advisors at Evercore are among the most experienced in their fields, many with advanced degrees and professional designations. We are able to administer complex trusts, manage unique assets including real estate, limited liability companies, alternative assets, closely held businesses, and life insurance, and navigate sensitive family situations. Additionally, we have valuable experience in advising individuals and families considering a liquidity event or other transaction that will impact family trusts and other holdings.

We take the time to get to know our clients and, as appropriate, other advisors and family members, to review document terms and develop a plan to administer the trusts, now or at a future date. We actively manage the asset allocation for the trusts and oversee discretionary distribution requests, mindful of both family dynamics and the impact of income and estate taxes, fees, and inflation.

There are no 1-800 numbers at our firm and no outsourced call centers. Clients have a direct relationship with the investment, planning, and fiduciary professionals who manage their family's wealth. Communication is on each client's terms, with customized performance reports and regular meetings to review the investment portfolio, discuss our views in light of the family's changing circumstances, and identify planning and fiduciary opportunities and areas for improvement.

We are pleased to work closely with our clients' accountants, attorneys, and other trusted advisors to deliver innovative, timely, and flexible planning and trust solutions, ensuring the development of a coordinated plan.

Clients also have access to commentaries on current market and economic events, as well as educational articles, published in our quarterly journal *Independent Thinking*, and invitations to exclusive events, featuring both our own experts and external business leaders and thought leaders, addressing many of the key issues facing families today.

A FLEXIBLE APPROACH

We are pleased to serve as sole trustee, co-trustee, directed trustee, successor trustee, or agent for trustee, alongside another trusted advisor, friend, or family member. We can serve as an executor or personal representative in our client's estate plan as well.

Individuals who have been nominated for the important role of trustee or co-trustee are able to rely on our custodial, recordkeeping, and beneficiary reporting capabilities, which are included with investment management at no additional fee if Evercore Trust Company, N.A. is the custodian.

At Evercore, we are committed to supporting individual trustees or co-trustees with our experience and our resources, working together to fulfill the purposes of the trust and its role within the family's long term legacy and estate plan.

OUR PERSONAL TRUST AND FIDUCIARY SERVICES INCLUDE:

- Executor or personal representative in an estate administration
- Trustee services (including Delaware directed trustee services) and custody of assets
- Active management of cash, fixed income, and core equity proprietary strategies
- Active management of asset allocation, including tactical rebalancing using a goals-based approach
- Selection and monitoring of outside managers
- Integration of tax, charitable and family gifting, estate planning, and other financial services
- Close communication with attorneys, accountants, and other trusted advisors
- Accounting, recordkeeping, and tax reporting
- Custody services through Evercore Trust Company, N.A.
- Financial education and family governance services

To learn more about Trust and Family Wealth Services at Evercore, please visit www.evercorewealthmanagement.com or www.evercoretrustcompanyofdelaware.com.

Delaware

Delaware has long been recognized as a jurisdiction friendly to trustors creating new trusts and to beneficiaries of existing trusts.

Delaware offers a wide array of planning options to sophisticated estate planners and their clients.

Evercore Trust Company of Delaware provides clients with access to the benefits of a Delaware Trust, including:

- Tax savings: Potential income and estate tax savings for nonresidents with Delaware Incomplete Non-Grantor Trusts[2]
- Perpetual planning with Delaware Dynasty Trusts
- Preservation of assets for solvent trustors with Delaware Asset Protection Trusts
- Confidentiality and privacy with Delaware Silent Trusts
- Expanded investment opportunities for trust assets in accordance with the Delaware Prudent Investor Statute
- Flexible situs and trust amendments for Irrevocable Trusts through Decanting Statute, Mergers, and Non-judicial Settlement Agreements
- Bifurcation of trustee responsibilities among Investment Advisor, Distribution Advisor, and Administrative Trustee to further enhance the flexibility and management of multi-generational trust assets in Delaware Directed Trusts.[3]

[1] As reported on the most recently filed Form ADV Part I

[2] Not available to New York residents

[3] Investments and distribution decisions in Delaware trusts can be directed by, respectively, an investment advisor, and distribution advisor. A trust protector, who may be charged with appointing the trustee, can also be named.

Please contact Chris Zander, Chief Wealth and Fiduciary Advisor at Evercore at zander@evercore.com for further information on personal trust and fiduciary services at our firm. Alternatively, contact the office nearest you:

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