



WEALTHADVISOR

THE VOICE OF THE FINANCIAL ADVISOR COMMUNITY



AMERICA'S MOST
**ADVISOR-FRIENDLY
TRUST COMPANIES**

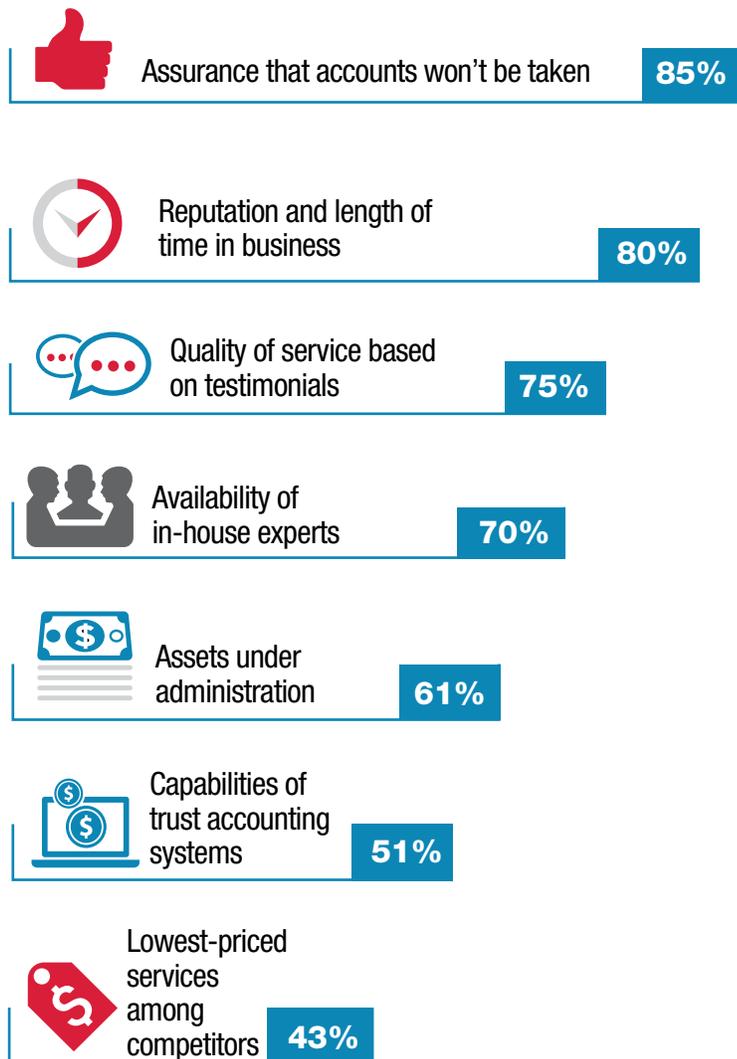
— 2021 —

THE WINNERS LIST

DETAILS ON THEIR TECHNOLOGY, CUSTODIANS, FEES, IN-HOUSE
EXPERTS, ADVISOR SUPPORT, AND MORE

WEALTH ADVISOR FINANCIAL ADVISOR SURVEY RESULTS

WHAT MAKES A TRUST COMPANY ADVISOR-FRIENDLY?



Source: Wealth Advisor survey December 2020.
Respondents were allowed to select all choices that applied.



ICONTRUST
Gino Pascucci
Chief Marketing
Officer

With a new administration and rumors of a decreasing estate tax exemption, wealthy families will need estate tax planning advice in 2021 and beyond. For advisors, there has never been a more opportune time to partner with a law firm and an advisor-friendly trustee to offer estate planning services. Advisors who are proactive in providing advice in a new tax environment are poised to attract many new wealthy families to their business. At IconTrust, we feel our flat fee schedule for all trust services is a true differentiator in the marketplace. We built IconTrust with simple procedures and simple fees that everyone can understand. We believe our model will set a new standard for how a modern trust company should operate and provide service to advisors and their clients.



IconTrust • 3900 S. Hualapai Way, Suite 106, Las Vegas, NV 89147 • www.icontrustnv.com

IconTrust is the first advisor-friendly trust company to institute a flat fee schedule for all trust services. Our fees are based on the duties required of us as trustee, not the value of the trust assets.

We collaborate with financial advisors instead of competing for assets under management. Financial advisors remain the CEO of the trustee-client relationship and we work behind the scenes to provide trust administration at a flat rate.

Benefits of the IconTrust Model:

No investment management – Advisors continue to manage investments on their preferred custodial platform. You choose where you want to custody your client's assets.

Access to Nevada's Trust Laws - Offering trust services with a Nevada trustee gives you a competitive advantage over local trust companies. You can now recommend advanced estate and asset protection planning strategies like Asset Protection Trusts, Dynasty Trusts, and state income tax planning.

Independence - We work with independent and wirehouse advisors. We view the financial advisor as our client. If you switch broker dealers, IconTrust and your client will go with you.

Transferring a Trust - If you come across existing trust business, we can help facilitate the process of removing the current trustee, appointing IconTrust, and securing new assets under management for your business. We call it the Win/Win/Win solution.

New business contact:

Gino Pascucci, Chief Marketing Officer

Phone: (702) 998-3700

E-mail: gino@icontrustnv.com

Brian Simmons, Chief Trust Officer

E-mail: brian@icontrustnv.com

States Licensed In: NV

Average Account Size: \$2.7 million

of In-House Experts: 6

Trust Accounting System: Accustrust Cheetah

Timeframe For Acceptance of New Trust: 48 hours

Fee Scale: Flat Fees. No Fee Scale.

Annual Flat Fee Directed Trusts: \$3,000

Annual Flat Fee Traditional Trusts: \$5,000

Supports Directed Trusts: Yes

Supports Delegated Trusts: Yes

Custodians Supported: All custodians supported

Marketing Support Provided: Brochures, client-approved materials, client materials, client proposals, digital, emails, on-site video studio, online resources, quarterly newsletters, sales ideas, social media, videos

The Whole Truth About the Price of Trust Services

WARNING

What you're about to read may change the way you and your clients shop for trust services forever.

Despite what you are told by trust companies, their administrative services are about the same.

The question is, how much will they cost?

"If the time to administer the trust is the same, and the quality of service is the same.....

Why pay more?"

That was the question we wanted to answer when we set out to disrupt the trust industry.

Traditional Fee Fiction	Flat Fee Facts
Clients are used to paying asset-based fees	Asset based fees confuse clients Flat fee = No calculator needed
Trustees should charge just like investment advisors	Why? Administration is a fixed expense
Service is compromised with a flat fee	Price charged does not reflect the quality of administration
This is the way trustees have always done it	A poor reason to not innovate
Usually charge setup, closing, and additional fees	Consumers are tired of being nicked and dimed
Asset based fees imply asset management	Flat fees imply administration only

For decades, the trust industry has used a basis-point fee schedule similar to investment advisors—despite little difference in time spent on a large trust versus a smaller trust.

We didn't think this made sense. So in a world that is increasingly moving toward radical transparency, IconTrust created the first fully transparent flat-fee trust model — where your clients know exactly what they are paying upfront, and they still get the same impeccable service that they would expect from an institutional firm.

Created in the spirit of collaboration with advisors and for advisors, we believe this is an opportunity to save your clients and their families considerable money over the years, and look like the hero in the process.

To learn more about our flat fee trust model, the exact fee schedule, and how much you can save your clients per year, call (702) 998-3700.



IconTrust, LLC

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