#### **WORKING WITH INDIVIDUALS AND FAMILIES**

*IconTrust* is a fully independent *Nevada* trust company.

- Trust administration only
- Flat fee schedule
- National clientele
- Access to Nevada's trust laws
- Highest personal service and responsiveness
- Retain existing professional relationships

## YOU'RE THE CENTER OF YOUR ESTATE PLANNING TEAM



Your Attorney – Drafts your trust
Your Financial Advisor – Manages the investments
Your CPA - Prepares the tax returns
IconTrust, LLC – Carries out your wishes

#### **GET STARTED TODAY!**







#### **WORKING WITH ATTORNEYS**

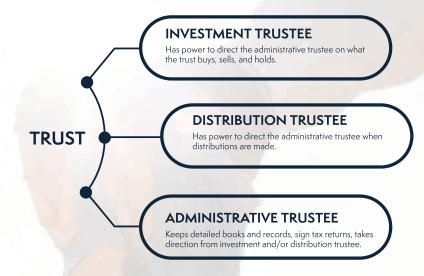
We make it **SIMPLE** for you and your clients.

- O Trust administration with streamlined onboarding.
- Flat trustee fees that are simple for you to explain and easy for your clients to understand.
- Access to Nevada situs for asset protection, dynastic planning, and state income tax savings.

#### TRUSTEE SERVICES

Opirected Trustee Services:

**IconTrust** serves as administrative trustee and/or distribution trustee only.



Traditional Trustee Services:

IconTrust serves as trustee with full powers.



**IconTrust** delegates investment management to the client's financial professional.

#### **WORKING WITH FINANCIAL ADVISORS**

Our advisor-friendly model allows us to work with you instead of competing with you for assets under management.

"A trust is an investment accou<mark>nt w</mark>ith instructions.

You handle the investment account,

IconTrust handles the instructions."

*IconTrust* helps *your* business stay your business.

## HOW TO DESIGNATE ICONTRUST AS TRUSTEE IN YOUR CLIENTS DOCUMENTS

Name IconTrust as Success Trustee (No cost until we step in)

- "IconTrust, LLC" is how we should be named in trust documents.
- Send us a copy of the trust for our future business file. You, as the advisor, will be tied to the account.

#### TRANSFERRING AN EXISTING IRREVOCABLE TRUST

Replacing another trustee with IconTrust, LLC

- Client provides a copy of the trust.
- We confirm with the client's attorney the documents necessary to change the trustee.
- We contact prior trustee to coordinate transfer and retitling of assets.

Learn how to make your clients' assets sticky and your practice more valuable.

Call us today!

(702) 998-3700

Visit our website IconTrustNV.com











icontrustnv.com **(702) 998-3700** 

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### **GET STARTED TODAY**

- 1. Make an appointment with your estate planning attorney to have your trust drafted.
- 2. Contact your attorney today and name *IconTrust, LLC* as your trustee today or as successor trustee in a future capacity.
- 3. Forward a copy of your trust to your IconTrust Officer.

# ICCAN TRUST

PERSONAL SERVICE YOU CAN TRUST FLAT FEES YOU CAN UNDERSTAND