

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!

1

MAKE AN APPOINTMENT WITH YOUR ESTATE PLANNING ATTORNEY TO HAVE YOUR TRUST DRAFTED.

2

HAVE YOUR ATTORNEY NAME **ICONTRUST, LLC** AS YOUR TRUSTEE TODAY OR AS SUCCESSOR TRUSTEE FOR THE FUTURE.

3

FORWARD A COPY OF YOUR TRUST TO YOUR **ICONTRUST** OFFICER.

WORKING WITH ATTORNEYS

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

- 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

Directed 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 account with 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**



ICONTRUST



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.

ICON TRUST

PERSONAL SERVICE YOU CAN TRUST
FLAT FEES YOU CAN UNDERSTAND