

Directed Trusts

Directed Trusts give the power to You, not the trust department.

This revolutionary model enables you to maintain the trusted relationships with your professional advisors – your local attorney, CPA, and financial advisor – to provide customized trust solutions integrated with your existing wealth management strategies. A premier service is provided when self-selected, independent professionals are all working together for your benefit.

A Client-Centered Service

Charles Schwab & Co. has a history of putting the Client first and foremost. As standardized commission-rates were removed in 1975, Schwab introduced discount brokerage services. Brokerage houses have had to lower their commission rates to remain competitive – and today the Client directly benefits from these lower costs.

The Directed Trusts concept will challenge traditional trust services in much the same way. This new trust service model will give you the power to create and customize your own personal trust service through the local professionals you know and trust – and quite often, at a significant savings to you.

Charles Schwab Bank Personal Trust Services

The Directed Trust platform was created in November 2007 by Charles Schwab Bank under the guidance of Thomas M. Forrest, former CEO and President of US Trust Company of Delaware, arguably the nation's most prestigious trust company. Mr. Forrest brings decades of expertise managing multi-billion dollar trust companies to Schwab in a partnership to create the nation's premier trust company. Schwab's goal is to develop a trust services model that could deliver the support and expertise of a large institution, the level of service and face-to-face contact of a local provider, with a focus on quality and with an effort to reduce the end-cost to you from Schwab, and fully include the professionals that work with you on a day-to-day basis.

Sunrise Advisors

Sunrise Advisors is an independent, "fee-only" Registered Investment Advisor located in Leawood, Kansas. For over 35 years, David P. Scott, Chairman of Sunrise Advisors, has specialized in providing wealth management services for high net-worth individuals and families. Fiduciaries, by law, are required to put your needs ahead of their own. This ideology is distinctly reflected in our "fee-only" compensation structure.

Sunrise is a multi-generational, family-owned business and is uniquely positioned to get to know and work with families for generations. In addition to Schwab's trust administrators assigned to every account, Sunrise has dedicated local employees to act as a trust coordinator to handle the day-to-day and personal services required by each Client – picking up checks, safety deposit box, meeting with attorney/CPA to execute desired strategies, etc.

How You Benefit from Directed Trusts

- You, not the trust department, determine who works for you.
- Directed Trusts ensure you remain the focal point of service. You continue to receive the same level of service you expect and are accustomed to from your existing, local professionals.
- The fiduciary powers of trust services – administration and asset management – are separated and add another set of checks and balances to Client service.
- The removal of potential conflicts-of-interest that may be present when using the trust department's own proprietary investment products and services.
- The multiple advantages of Delaware law which are not available in KS or MO: the possible elimination of state income tax on irrevocable trusts, greater flexibility in distributions, increased privacy, etc.

To learn more about Directed Trusts and how it can help you, please contact:

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“Rescuing Clients from Trust Departments”

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