



**COUNSEL TRUST**  
 — COMPANY —  
 DRIVEN BY YOUR BEST INTERESTS

Counsel Trust Company • 1033 Demonbreun Street, Suite 300, Nashville, TN 37203 • [www.counseltrust.com](http://www.counseltrust.com)

**Counsel Trust**, established in 2002 by trust professionals—all former executive-level trust officers of banks—was created to serve the needs of independent advisory firms. With deep experience in providing directed trustee services to advisors, attorneys and other firms with trust needs, Counsel is extending and broadening its directed trustee services. Counsel Trust is chartered in Tennessee, one of the most “trust friendly” states, offering advisor clients significantly enhanced trust and estate planning capabilities.

Counsel understands how vital it is for advisors to direct and control their client relationships. Counsel’s primary goal is to become the advisor’s trust affiliate, offering seamless and transparent back-office trust services. Advisors can also choose to private-label their own trust company, with Counsel providing trust administrative services in the background.

Counsel offers complete asset custody flexibility, enabling advisors to maintain their own custodial platform (or choose another platform) for complete portfolio management continuity. This valuable capability avoids the inconvenience of transferring advisor-managed client assets to a separate trust custody platform.

Counsel Trust is committed to offering high-quality, attentive trust administrative services, enabling advisors to concentrate on investment management and maintaining the client relationship. Advisory clients receive the benefit of quality management within a trust structure that serves their unique estate- and investment-planning needs.

**New business contact:**

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**States chartered/licensed in:** Tennessee

**Average account size:** \$2 million

**Total assets under administration:** \$1.7 billion

**Custodians supported:** Works with all

**Number of relationships with advisors:** 50 +

**Fees** (for directed and discretionary trust services)

**Annual minimum fee:** \$2,500

**Fee scale:**

|                   |       |
|-------------------|-------|
| First \$1 million | 0.40% |
| Next \$2 million  | 0.35% |
| Next \$2 million  | 0.30% |
| Next \$5 million  | 0.25% |
| Over \$10 million | 0.20% |

**In-house experts:** 5

**Trust accounting system:** SEI

**Supports directed trusts:** Yes

**Support delegated trusts:** Yes

**Typical timeframe for acceptance of new trust:**

24 to 48 hours

**Marketing support includes:** Brochures, face-to-face meetings with advisors, clients and prospects nationwide.