PEAK TRUST COMPANY

(888) 544-6775
www.PeakTrust.com

Delegated Trusts

Who We Are

The Trustee Partner Advisors Trust for Oversight and Risk Management.

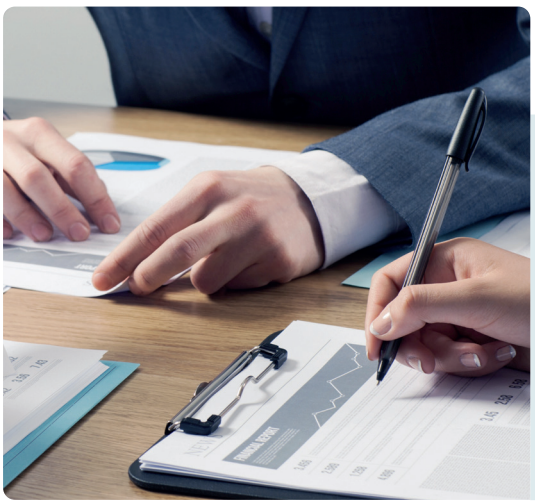
Advisors who serve HNW and UHNW families need a trustee partner who supports but doesn't compete with their investment role. **With more than 27 years of experience** and charters in **Alaska and Nevada**, Peak Trust provides sophisticated fiduciary oversight with the responsiveness independent advisors expect.

As a full-service trustee, Peak Trust can formally delegate investment management to an advisor while retaining fiduciary oversight and administrative authority in accordance with trust law.

How We Serve You

Working with Peak Trust in a delegated trust means you gain:

- **Investment continuity and control**
  You continue managing the portfolio while Peak handles the trustee responsibilities.
- **Aligned partnership**
  Our trustee role is structured to support advisor-led investment management.
- **Administrative efficiency**
  We manage trust accounting, distributions, and the required documentation.
- **Clear fiduciary procedures**
  Peak provides the trustee-level reviews and reporting required under the trust.
- **Direct access**
  Work with experienced trust officers without layers of bureaucracy.



Delegated Trusts at Peak Trust

You manage the assets. Peak handles the trustee responsibilities.

In a delegated trust, Peak Trust is the full trustee. We delegate investment management to you, while fulfilling the oversight and administrative responsibilities required under the trust. Advisors maintain portfolio control and client relationships while partnering with a trustee built to support that structure.

"Each member of the team at Peak Trust is professional, personable, and capable... a good choice for clients who want the job done well with flexibility and friendliness."

— **Layne T. Rushforth**, Rushforth Firm Ltd.

Our Approach

Peak Trust is built for advanced fiduciary responsibilities. As trustee, we manage oversight, ensure compliance, evaluate investment performance, and document the entire process so advisors can focus on client service. Our team provides a clear framework that supports your investment role and your practice.

Advisors often choose delegated trusts when clients want the advisor to continue managing the portfolio but prefer Peak Trust to assume fiduciary responsibility for oversight, monitoring, and administrative execution.

Service Features

Advisor-delegated investment management

Peak Trust formally delegates investment authority while retaining oversight responsibility.

Fiduciary monitoring

Ongoing due diligence, performance monitoring, and compliance evaluation.

Administrative execution

Distributions, trust accounting, beneficiary coordination, and tax reporting.

Documented reviews

Peak Trust provides the trustee-level reviews and documentation required under the trust.

Alaska & Nevada advantages

Long-term dynasty planning, tax efficiency, asset protection.

Seamless coordination

Peak Trust ensures investment management and trust administration align.

Why Choose Peak Trust

Clear Division of Responsibilities

Delegated trusts create a clear structure: you manage the investments, and Peak Trust fulfills the trustee responsibilities required under the trust.

Continuity With Client Relationships

You remain the portfolio manager; Peak Trust supports the strategy with trustee-level governance.

Built for Advisors

We understand advisor workflows, custodians, and compliance needs, streamlining operations so you can focus on planning and investment.

True Full-Service Trustee

Unlike directed-only providers, Peak Trust can serve as full trustee, directed trustee, or delegated trustee, giving you the flexibility to match any trust document.

Trusted by Leading Firms

Over 1,500 estate planners and 2,500 families rely on Peak Trust for advanced trust administration.

Comparison: How Delegated Trusts at Peak Trust Differ

	Large Corporate Trustees	Peak Trust Delegated Model
Investment Control	Bank may take over or restrict	Advisor manages investments; Peak Trust carries oversight responsibility
Fiduciary Risk	Bank holds risk but may limit advisor involvement	Peak Trust fulfills the trustee responsibilities; advisor remains primary investment partner
Client Experience	Slow, bureaucratic, impersonal	Integrated, responsive, advisor-centric
Minimum Requirements	Very high minimums	No minimums
Flexibility	Rigid processes, limited collaboration	Highly collaborative; works with complex plans

If the trust document allows for directed trustee arrangements or separation of trustee duties, we can also structure bifurcated or trifurcated trusts to meet your clients' specific needs.

The Trusted Advantage

Peak Trust delivers the sophistication of a full-service trustee with an advisor-first partnership that strengthens your client relationships.

Connect with Peak Trust to explore delegated trust solutions for your clients.

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