

ARDEN TRUST FACT SHEET

BOUTIQUE TRUST COMPANY WITH A BALANCE SHEET

STRENGTH AND STABILITY



\$7.5+ Billion

in Assets under Administration



\$400+ Million

of Special Assets (real estate, closely held business, oil & gas, etc.)



\$45+ Million

in Capital and Surplus



\$250+ Million

in Special Needs Trusts



514 Irrevocable Life Insurance Trusts



3,000 Relationships

ABOUT US



- Trust Company established in 1975
- May administer in all 50 states

Employees

92

Trust Officers

35

8

Office Locations



5

Sales Executives



16

years average trust industry experience



42

advanced degrees and professional designations

WHAT WE OFFER

Trust Offerings

- Asset Protection Trust
- Credit Shelter Trust
- DE Directed Trust
- Dynasty Trust
- Charitable Trusts
- Irrevocable Trust
- Irrevocable Life Insurance Trust (ILIT)
- Revocable Trust
- Special Needs Trusts
- Total Return Trust

Special Services

- Agent for the Executor
- Agent for the Trustee
- Endowments
- Escrow Services
- Estate Settlement*
- Principal & Income Accounting
- Real Estate
- Special Assets

*Dependent on location

Custody with the Financial Advisor

The Financial Advisor will remain part of the relationship and act as the portfolio manager.

CONTACT OUR SALES TEAM

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