



WHAT ARE SOME REASONS TO HAVE A FAMILY TRUST COMPANY?

- The family needs an independent trustee and the traditional trustee options do not suit the family's circumstances (e.g., operating a significant family-owned business).
- A Family Trust Company focused on the family's circumstances may be better suited to handle specialized assets, such as agricultural properties, family-owned businesses, or alternative investments, including private equity and venture capital investments.
- A Family Trust Company can provide heightened responsiveness and flexibility for a family, including allowing the family to select separate investment managers for specific asset classes.
- A Family Trust Company fosters consolidation of investments and family office matters.
- A Family Trust Company can promote non-family financial objectives, including family succession planning and wealth education for younger generations.
- A Family Trust Company can provide an entrepreneurial mindset to the management of the family's investments.
- The family may desire to avoid being subjected to supervision by the Federal Securities and Exchange Commission (SEC), by instead subjecting the Family Trust Company to the supervision of the relevant state regulator.