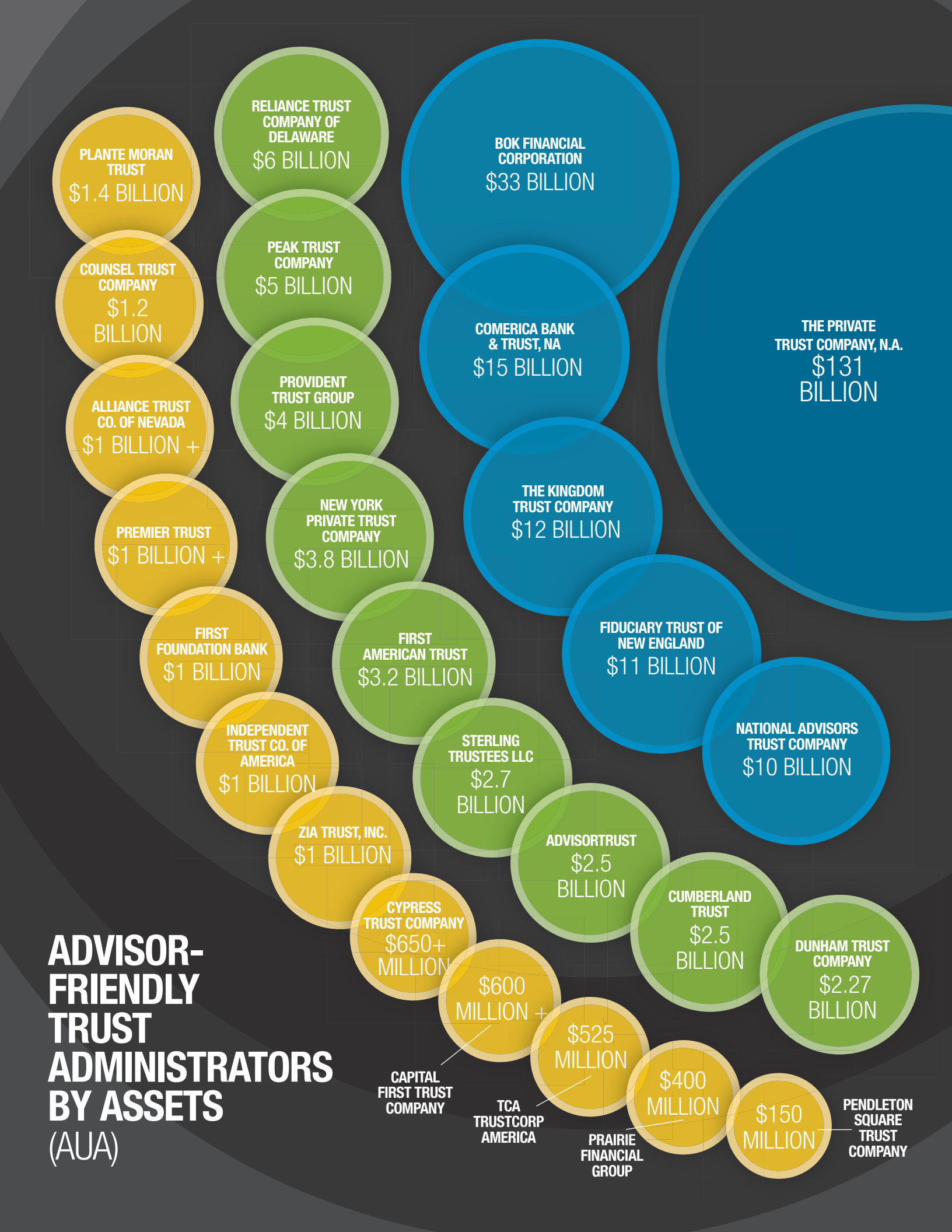
ADVISOR-FRIENDLY TRUST ADMINISTRATORS BY ASSETS (AUA)
PLANTE MORAN TRUST $1.4 BILLION
RELIANCE TRUST COMPANY OF DELAWARE $6 BILLION
BOK FINANCIAL CORPORATION $33 BILLION
COUNSEL TRUST COMPANY $1.2 BILLION
PEAK TRUST COMPANY $5 BILLION
COMERICA BANK & TRUST, NA $15 BILLION
THE PRIVATE TRUST COMPANY, N.A. $131 BILLION
ALLIANCE TRUST CO. OF NEVADA $1 BILLION +
PROVIDENT TRUST GROUP $4 BILLION
PREMIER TRUST $1 BILLION +
NEW YORK PRIVATE TRUST COMPANY $3.8 BILLION
THE KINGDOM TRUST COMPANY $12 BILLION
FIRST FOUNDATION BANK $1 BILLION
FIRST AMERICAN TRUST $3.2 BILLION
FIDUCIARY TRUST OF NEW ENGLAND $11 BILLION
INDEPENDENT TRUST CO. OF AMERICA $1 BILLION
STERLING TRUSTEES LLC $2.7 BILLION
NATIONAL ADVISORS TRUST COMPANY $10 BILLION
ZIA TRUST, INC. $1 BILLION
ADVISORTRUST $2.5 BILLION
CYPRESS TRUST COMPANY $650+ MILLION
CUMBERLAND TRUST $2.5 BILLION
DUNHAM TRUST COMPANY $2.27 BILLION
$600 MILLION +
CAPITAL FIRST TRUST COMPANY
$525 MILLION
TCA TRUSTCORP AMERICA
$400 MILLION
PRAIRIE FINANCIAL GROUP
$150 MILLION
PENDLETON SQUARE TRUST COMPANY

The Private Trust Company, N.A.

The Private Trust Company, N.A. • 4707 Executive Drive, San Diego, CA 92121
www.theprivatetrustcompany.com

The Private Trust Company, N.A., licensed in all 50 states under its 1995 national banking charter, serves as trustee, co-trustee or agent for the trustee while specializing in delegating investment and relationship management to financial advisors.

This model allows for clients and beneficiaries to utilize the experts of The Private Trust Company to provide professional trust administrative services while outsourcing the investment management services to their chosen financial advisor.

As a financial advisor or RIA, where do you find prospects with personal trusts? The best place to start is in your own book of business. You may have clients with trust accounts that are currently managed by an institution and are dissatisfied with the quality of service or investment performance of their account.

For these clients, it may be possible to transfer the trust to The Private Trust Company and have the assets managed by you, their chosen financial advisor. New trusts can name PTC as current trustee or successor trustee to the grantor.

In addition, The Private Trust Company can assist individual trustees in the administration of their trusts in our capacity as agent. Simply put, your client remains trustee while delegating administrative and operational duties to PTC for the purposes of ensuring compliance with the governing instrument and applicable state law.

The Private Trust Company, N.A., is an affiliate of LPL Financial.

New business contact:
Christopher J. McCutcheon,
SVP and National Sales Manager
Phone: (800) 877-7210 x7990
E-mail: Christopher.McCutcheon@lpl.com

States chartered/licensed in: National Charter

Average account size: $2 million

Total assets under administration: $131 billion

Custodians supported: Works with some

Number of relationships with advisors: 650

Fees (for directed and discretionary trust services)

Annual minimum fee: $5,500

Minimum account size: $1.5 million
Tax processing and return preparation fee of $500 will be charged annually

Fee scale:

First $1 million	65 bps
Next $2 million	55 bps
Next $2 million	45 bps
Next $5 million	35 bps
Above $10 million	25 bps

In-house experts: 5

Trust accounting system: InnoTrust

Supports directed trusts: Yes

Supports delegated trusts: Yes

Typical timeframe for acceptance of new trust:
5 business days

Marketing support includes: Brochures, articles and white papers, webinars, business development mentoring.