



For you. For them. For generations to come.

Who are we?

Designed specifically to work with Financial Advisors, we are a privately owned trust company based in Reno, Nevada, with more than \$2.5 billion trust Assets Under Administration* and a refreshing ability to think creatively. Dunham Trust Company was founded in 1999 and is licensed in both Nevada and Colorado. We have a nationwide client base and our typical timeframe for accepting a new trust is three to 10 days.

Why Nevada?

- ✓ No state income tax, no state gift or estate tax, no corporate income tax, and no franchise tax
- ✓ A preferred state for domestic asset protection trusts
- ✓ It is a superior dynasty trust state
- ✓ One of the best states for decanting a trust
- ✓ Outstanding privacy laws

Leverage our expertise

You don't need to be a trust expert to offer trust services to your clients. We'll expertly administer the trusts while letting you manage your client relationship. We ensure that your clients' retirement and estate planning goals are handled according to their wishes and that their estates are transferred to their heirs in an orderly, cost-effective and thoughtful manner.

Key Benefits

- ✓ In-house experts
- ✓ All of the benefits of a Nevada trust company
- ✓ Competitive Fees
- ✓ Accessibility
- ✓ A collaborative approach working with Financial Advisors and their clients' other advisors
- ✓ Exceptional Service

Advisor friendly

- ✓ Established specifically to work with Financial Advisors
- ✓ 100+ relationships with Financial Advisors
- ✓ Named one of the most advisor friendly trust companies for the last five years by The Trust Advisor™

A full range of trust services

Directed Trusts

Insurance Trusts

Charitable Remainder Trusts

Generation-Skipping Trusts

Discretionary Trusts

Living Trusts

Incentive Trusts

Credit Shelter Trusts

Asset Protection Trusts

Dynasty Trusts

Special Needs Trusts

Special Asset Vehicles

Funeral/Pre-Need Trusts

Custodial Services

Contact us

When you identify clients and prospects who would benefit from a trust, give us a call:

Phone: (800)442-4358

Email: RD&RMA@dunham.com

Website: www.dunhamtrust.com

*as of December 31, 2018