



CORNERSTONE TRUST

Chad Halbur
President

There is more to leaving behind a legacy than assets and wealth. It is important to provide a foundation for the division of your clients' assets when they die. Estates can create family tension and anger among the survivors, who will become your clients going forward if they aren't already. When the family members feel slighted or don't get what they expect, they often take their business elsewhere. Even with a will and beneficiaries who are not combative, there is no way to explain or communicate what your clients were hoping to leave behind, what they wanted their life's work to be for the family and causes they loved. Conversations about death and wealth are hard but they are so important to ensure that your clients' legacy is the one they intended and you helped build. We can help.



Cornerstone
PRIVATE ASSET TRUST COMPANY, LLC

Cornerstone Private Asset Trust Company, LLC • 524 North Main Avenue, Suite 211, Sioux Falls, SD 57104 • www.alliancetrustcompany.com

Cornerstone Private Asset Trust Company, LLC, is a boutique trust company working with individuals to help them implement their estate planning goals and transition wealth from one generation to the next.

We walk alongside beneficiaries and assist them as the grantors dreams for their family are realized years and decades after the grantor has passed on.

We partner with investment professionals to provide administrative trustee services to enhance the client advisor relationship.

An independent public trust company based in Sioux Falls, South Dakota, Cornerstone provides unique tax advantages to its clients as well as a wide variety of specialized trust services, including:

Cornerstone provides personalized services by focusing on the individual nature of each client and their goals.

- Irrevocable Trusts
- Revocable Living Trust
- Trusts Under Wills
- Charitable Trusts
- Dynasty Trusts
- Asset Protection Trusts

We find that in learning what makes each client unique we are able to help meet the grantors longer term goals to ensure a successful outcome. We also provide comprehensive education for beneficiaries on the financial resources set aside for their benefit.

New business contact:

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States chartered/licensed in: South Dakota and Minnesota

Average account size: \$1,150,000

Total assets under administration: \$430 million

Total assets under management: \$342 million

Custodians supported: All major domestic

Number of relationships with advisors: 41

Annual minimum fee: \$3,500

In-house experts: 3

Trust accounting system: Infovisa

Supports directed trusts: Yes

Supports delegated trusts: Yes

Marketing support includes: Brochures, Client approved matters, Client Functions, Client Proposals, Digitals, Emails, Fact Sheets, Investment Strategist Relationships, Portfolio Management Access, Quarterly Newsletters, Seminar Programs, Social Media