



## Delegated Trust Services: Benefits for Financial Advisors

Our delegated trust solution allows our partners to offer comprehensive trust services without giving up investment control or taking on fiduciary liability. By partnering with us, advisors can retain management of client assets, deepen multigenerational relationships, and provide clients with flexible, tax-efficient trust structures – all while minimizing compliance risk and enhancing their value proposition. It’s a smart way to grow your practice, retain assets, and meet your clients’ evolving estate planning needs.

<b>Advisor-Centric Process</b>	<ul style="list-style-type: none"> <li>• The delegated trust model enhances the advisor’s role, enabling you to continue managing assets while leveraging Nottingham Trust’s expertise in compliance and administration.</li> <li>• The advisor is positioned as a trusted professional who provides holistic financial services without compromising client relationships.</li> </ul>
<b>Retention of Client Relationships</b>	<ul style="list-style-type: none"> <li>• The advisor maintains the primary role in managing the trust’s investment assets and cultivating relationships with trust beneficiaries, including both current and remainder beneficiaries.</li> <li>• Nottingham Trust supports the advisor’s existing relationship by handling administrative duties, allowing the advisor to focus on investment strategies and client engagement.</li> </ul>
<b>Collaborative Partnership</b>	<ul style="list-style-type: none"> <li>• Nottingham Trust acts as the corporate trustee, overseeing compliance and administrative aspects while delegating investment management to the advisor. Investment assets remain on advisor’s custody platform.</li> <li>• A streamlined process ensures clear roles and responsibilities, reducing administrative burden on the advisor.</li> </ul>
<b>Regulatory and Fiduciary Support</b>	<ul style="list-style-type: none"> <li>• As a corporate trustee, Nottingham Trust assumes fiduciary oversight, ensuring compliance with applicable laws, fiduciary standards, and the trust instrument.</li> <li>• The advisor benefits from Nottingham Trust’s experience in trust administration, compliance, and reporting, which minimizes risk exposure.</li> </ul>
<b>Efficient Onboarding and Ongoing Support</b>	<ul style="list-style-type: none"> <li>• Comprehensive onboarding processes, including pre-acceptance review, introductory calls, and document preparation, ensure seamless integration of new trusts.</li> <li>• Nottingham Trust’s mirrored booking system and consolidated trust statements simplify reporting, ensuring transparency for beneficiaries without additional work for the advisor.</li> </ul>
<b>Simplified Administrative Services</b>	<ul style="list-style-type: none"> <li>• Nottingham Trust manages fiduciary taxes, K-1 forms, beneficiary distributions, and communication regarding administrative matters.</li> <li>• The advisor is relieved of complex trust administration tasks, allowing them to focus on financial planning and growing their practice.</li> </ul>

### Transparent Account Structure

