



## Introducing Stifel Trust Company Delaware, N.A.

Delaware is a popular jurisdiction for wealthy and ultra-wealthy families to work towards their estate and trust planning goals. Delaware laws demonstrate the state's unsurpassed commitment to allow families extraordinary flexibility in the management of their financial affairs. Stifel Trust Company Delaware, N.A. (Stifel Delaware Trust) not only provides access to Delaware law, it also offers a world-class investment platform that can deliver solutions tailored to a client's specific needs, through discretionary or directed-asset management. This platform facilitates the use of discretionary core portfolios managed by Stifel Delaware Trust, including monitoring, rebalancing, and reporting, coupled with guided, opportunistic trading strategies.

Stifel Delaware Trust is able to offer clients a very favorable, trust-friendly jurisdiction. For example:

- Use of a Delaware trustee allows trusts to continue over generations, even indefinitely, providing objectivity, continuity of administration, and long-term, disciplined asset management, while seeking to maintain a valuable legacy.
- Wealthy families may move their trusts or assets to Stifel Delaware Trust from high income tax jurisdictions to take advantage of favorable tax laws.
- A "directed trust" under Delaware law permits a grantor to appoint a third-party advisor, which could be a family member, to direct the trustee in investing the trust's assets. This arrangement may be particularly desirable when the trust owns a closely held business, or low basis securities, and the family wished to retain control over the disposition of these assets.

- Delaware has strong statutory protection for beneficiaries from claims made against a trust's assets by a beneficiary's creditors. It is also possible under Delaware law for a client to create a trust, fund it with their own assets, be a trust beneficiary, and protect those assets from their creditors.
- Many high-net-worth individuals are sensitive to sharing too much information with their children and grandchildren about their wealth. Delaware trusts are not subject to public registration or filing requirements. Delaware also permits a "Quiet" trust, whereby the settlor of a trust can limit the beneficiaries' knowledge to the trust during the settlor's lifetime, and after his or her death. A Delaware "Quiet" trust may be the perfect solution for those types of situations.
- Delaware trusts are subject to the exclusive jurisdiction of Delaware's Chancery Court, which has expertise in quickly resolving tough trust questions.

Stifel Delaware Trust offers a broad, integrated investment platform to wealth families and business owners wishing to create or transfer a trust of \$5 million or more in assets to take advantage of the special services offered by a Delaware trustee.

▶ For more information on Delaware Trust Services, please contact your Stifel Financial Advisor.

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