

# Directed Trusts: Why Use One?

A trust can be an important step toward fulfilling your family's financial goals. There are specific advantages to having a trust: continuity of asset management, privacy, tax savings, and more.

## The Modern Choice

Historically, families only had three trustee options for long-term trust administration: (i) a family member; (ii) a trusted friend; or (iii) the local bank's trust department.

An independent trust company gives families new choices because it doesn't offer multiple products and services like a bank. It does one thing: act as trustee. This focused mission is made possible by partnering with the family's independent registered investment advisor, attorney, accountant and other professionals.

## The Directed Trust

Instead of one party making all the decisions, a directed trust separates investment management and trust administration. The trustee performs all important functions necessary to carry out the terms of the governing trust agreement, but refrains from commenting on the investments. The family's investment advisor is appointed as the trust investment advisor and is given the power to direct the trustee as to trust assets. The result is a directed trust.



## Why People Choose Directed Trusts

- » Professional administration by a single-mission, federally-regulated trust company
- » Keep the family's trusted financial advisor
- » Continuity of investment philosophy and selection
- » Ability to hold complex and closely held assets in a trust
- » Same or less cost than national bank model

### Where are Directed Trusts Available?

Working under a national charter, Carson Private Trust provides directed trust services in all states. **To learn more about working with Carson Private Trust, contact:**



**Sarah Duey**, JD, CTFA, CAP®, AEP®

Vice President, Trust Services

Carson Private Trust

402.315.5866

[sduey@carsongroup.com](mailto:sduey@carsongroup.com)

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**CARSON**  
PRIVATE TRUST

Carson Group  
14600 Branch St.  
Omaha, Nebraska 68154

carsongroup.com  
888.321.0808  
[info@carsongroup.com](mailto:info@carsongroup.com)