



PROCYON
TRUST



PROCYON
PARTNERS



Leading from a Position of Trust Creates Personalized Trust Services and Peace of Mind

As a client, you want personalized service with professional trust solutions and guidance. With Procyon Trust, you will receive the dedicated service and focused expertise you and your family need to help achieve peace of mind, continuity, and protection for your legacy.

As a Trust Representative Office of National Advisors Trust Company, one of the largest independent federally chartered trust companies, we specialize in providing comprehensive trust services to individuals and their families. Our mission is to guide our clients seamlessly through life's transitions.

At Procyon Trust, we believe open communication, a collaborative approach, strong accountability, and demonstrated value are paramount to building lasting client relationships. Working together with Procyon Partners estate planning professionals and financial advisors, we bring together a wealth of experience, regulatory expertise, objectivity, and a commitment to service, safety, and soundness. Our shared focus is on consistently delivering exceptional outcomes for the families and individuals we are honored to serve.

1

Procyon Trust

- Ensures safekeeping of all trust assets with clients' custodian(s)
- Performs trust administration duties as outlined in the trust document, such as distributions, statement production, tax reporting and bill paying
- Provides principal and income trust accounting

2

Procyon Partners Wealth Management

- Oversees the client/investment advisor/trustee relationship
- Manages the investments in accordance with the trust document while incorporating tax and estate planning strategies
- Works with multi-generational families

3

Estate Planning Professional

- Works with the client to recommend and establish the appropriate trust and provide estate tax advice
- Appoints Procyon Partners as the investment advisor and Procyon Trust as corporate trustee, co-trustee or agent for trustee

Procyon Trust Offers Comprehensive Solutions to Serve You

Our team of seasoned trust professionals provides a depth of experience and expertise for any number of different types of trusts. We are well positioned and prepared to perform fiduciary duties and provide expertise in tax and trust law. Our subject matter experts become your family's and advisor's resource to administer complex trust-related matters. We provide administration on multiple custodial platforms, affording your family flexibility. Our approach incorporates best-in-class design, implementation and delivery of corporate directed trustee solutions to help meet the needs and goals of high-net-worth individuals and families.



Agent for Trustee

Individuals sometimes appoint themselves, a family member, attorney or family friend as trustee of their trusts. Even in this situation, there are benefits from having Procyon Trust act as the Agent for Trustee. For many individuals, the administrative aspect of serving as trustee is time-consuming and challenging to ensure they stay in compliance with the trust document. Additionally, family members are often unfamiliar with and lack the necessary systems to properly account for transactions as required by Fiduciary Law. By appointing Procyon Trust to act as your agent, you (or the individual you have appointed as trustee) will still retain fiduciary responsibility, while the trust company provides asset custody, fiduciary accounting, trust-style statements, trust officer support, and investment management or co-fiduciary services.



Trust Services

- REVOCABLE TRUSTS & IRREVOCABLE TRUSTS
- CHARITABLE TRUSTS & FOUNDATIONS
- IRREVOCABLE LIFE INSURANCE TRUSTS (ILITS)
- INSTITUTIONAL TRUSTS
- AGENT FOR TRUSTEES
- REAL ESTATE TRUSTS

Custodial Services

- SECURITIES SAFEKEEPING
- INCOME COLLECTION FROM SECURITIES
- SETTLEMENT OF SECURITIES TRADES AS DIRECTED
- PAYMENT OF FUNDS WHEN DIRECTED
- TIMELY STATEMENT DELIVERY
- CUSTODY FOR UNIQUE & HARD-TO-VALUE ASSETS
- FIDUCIARY ACCOUNTING
- PORTFOLIO MANAGEMENT

Procyon Trust Will Navigate Your Legacy

The selection of a trustee or executor is vitally important to the creation of your estate plan. At Procyon Trust, we understand the complexities and gravity of securing your future. As a local, full-service resource, we are poised to expertly navigate your wealth journey and provide unwavering guidance.

Expertise. Retain Procyon Partners as the investment advisor to navigate the rocky shoals of volatile markets while gaining access to the talented, experienced trust professionals from Procyon Trust.

Cost Effective. Given our competitive fee structure, trust services are offered in a cost-efficient manner.

Flexibility. Opt to work with co-trustees by sharing administrative responsibilities to achieve the objectives of the trust and meet the needs of the beneficiaries, through creative decision making.

Local Support, National Coverage. Combining face-to-face meetings with your dedicated Procyon Trust representatives and having the scope of a federally chartered trust company provides peace of mind for clients. With national coverage, clients are able to relocate to other states with the knowledge that the move does not affect their trust administration.

Call us today to learn more about working with Procyon Trust.

For information and assistance contact us at:

Procyon Trust | (844) PROCYON
contactus@procyonpartners.net



Procyon Trust is a Trust Representative Office of National Advisors Trust Company.

National Advisors Trust Company is federally chartered and regulated by the Office of the Comptroller of the Currency (OCC), a bureau of the U.S. Treasury Department, and is authorized to do business in all 50 states. It is a member of the Federal Deposit Insurance Corporation (FDIC). By law, client assets are segregated from the capital assets of National Advisors Trust and are not subject to potential creditor claims against the trust company. As an independent trust company created by the client's trust advisor, the trust company's primary responsibility is to ensure the safekeeping of investment assets.