



Offer your Clients More: Partner with VNBT for WY Directed Trustee

Ventura National Bank & Trust (VNBT) coordinates comprehensive, flexible, and highly compliant Directed Trustee solutions in situs in Wyoming. As the financial landscape evolves, more RIAs are seeking options to support their clients' complex wealth management needs without losing their role in investment discretion. Our Directed Trustee services allow RIAs to offer strong fiduciary framework, operational efficiency, and the tax advantages of Wyoming's trust-friendly jurisdiction while reinforcing their client relationships.

Why Wyoming?

Wyoming has emerged as a premier jurisdiction for trust administration due to its advantageous laws and advanced protections for fiduciaries and beneficiaries. Key benefits include:

- **No State Income Tax:** Wyoming trusts benefit from a favorable tax environment, enhancing wealth preservation strategies.
- **Directed Trustee Structure:** RIAs retain control over investment management while VNBT assumes administrative and compliance responsibilities.
- **Strong Asset Protection Laws:** Wyoming statutes provide strong protections against creditor claims and legal judgments.
- **Perpetual Trusts:** Trusts in Wyoming can be established to last for multiple generations, ensuring long-term wealth continuity.
- **Enhanced Privacy:** Multiple layers of privacy protections keep trust details confidential. Wyoming trusts are not required to be registered with the state.

How RIAs Benefit

- **Maintain Assets Under Management and Investment Authority:** RIAs retain full discretion over investment management while we handle fiduciary duties.
- **Enhanced Legacy Planning and Relationship Durability:** Supports multi-generational trust planning and promotes long-term client retention and asset continuity. Clients retain their chosen advisors while strengthening enduring fiduciary relationships across generations.
- **Enhanced Client Service:** Our partnership allows RIAs to offer their clients more, including estate planning and asset protection.

- **Scalability & Efficiency:** Reduces administrative burdens and regulatory complexity, so RIAs can stay focused on client relationships.
- **Seamless Integration:** VNBT collaborates closely with RIAs to ensure smooth trust administration and ongoing communication.

Our Directed Trustee Model

VNBT serves as a Directed Trustee, allowing RIAs to maintain investment authority while leveraging our expertise in:

- **Trust Administration:** Ensuring compliance with trust documents, state laws, and regulatory requirements.
- **Fiduciary Oversight:** Providing oversight of distributions, tax reporting, and beneficiary services.
- **Regulatory and Legal Compliance:** Navigating the complexities of trust law and mitigating risk for all stakeholders.

Trust Structures We Support

- Revocable and Irrevocable Trusts
- Dynasty Trusts
- Spousal Lifetime Access Trusts (SLATs)
- Charitable Trusts
- Asset Protection Trusts
- Special Purpose Trusts

Why Choose VNBT? As a fiduciary partner, we offer:

- **Experience:** Our team has extensive expertise in modern trust administration and compliance.
- **Dedicated Support:** We provide personalized service to both RIAs and their clients.
- **Proactive Risk Management:** Ensuring regulatory compliance and reducing fiduciary liability.

Get Started Today. If you are an RIA seeking a trusted partner for Directed Trustee services in Wyoming, Ventura National Bank & Trust is here to help. Reach out to Brian Landzaat by phone at 314.686.9279, email blandzaat@vnbt.bank or visit www.vnbt.bank to learn more.

The information provided here is not intended as tax or legal advice and should not be taken as such; consult a qualified attorney or certified public accountant for professional guidance.