WEALTH ADVISORS TRUST COMPANY

Christopher Holtby
Co-Founder

100% focus on making the professional lives of advisors using WATC trustee services easy and natural.

Spending more money on digital tools to speed up the process of delivering trustee services.

Hiring more employees who are growth-oriented, can-do attitude, open/honest/vulnerable, and adaptive to change.

Trustee services are like a supply chain management puzzle. So much fun!

Wealth Advisors Trust Company
910 5th Street, Suite 10, Rapid City, SD 57701 • www.WealthAdvisorsTrust.com

Highlights

A **trust company** created for **wealth advisors**.

Offering **white glove trustee services** with some of the lowest account/trust officer ratios.

We work collaboratively with the advisor.

Our trustee services **enhance** the advisor/client relationships.

- Solve financial advisors two key pain points (AUM retention and growth) with our trustee services.
- Trust Officer serve specific financial advisors for a customized experience.
- Offer a Non-Compete guarantee.
- Distributions can occur within 72 hours.

…because YOU expect more.™

New business contact:
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States chartered/licensed in: South Dakota
Average account size: $2.8 million
Total assets: $1.9 billion
Custodians supported: The best ones
Number of FA relationships: 120 +

Fees: Based on proprietary algorithm centered on 7 factors of risk and time. Effective. Transparent. Win-Win.
Annual minimum fee: $7,500
Trustee Fee Ranges*:
First $3 million - 0.412% to 0.600%
Next $3 million - 0.388% to 0.544%
Next $4 million - 0.352% to 0.493%
Over $10 million - Negotiable

*Based on marketable securities for a fully directed trust (investments and distributions). We accept trusts holding non-marketable securities.

In-house experts: 7 (1 CPA, 1 Attorney, 2 Certified Financial Planners, 1 Certified Private Wealth Advisor, 2 Certified Trust and Fiduciary Advisors)
Trust accounting system: HWA and SalesForce
Supports directed trusts: Yes
Supports delegated trusts: Yes
Typical time-frame for acceptance of new trust: 48 hours
Marketing support includes: 90% close ratio when competing against traditional trust companies.