

Bankers Trust Company

FIRM OVERVIEW

- Includes Bankers Trust Company and wholly owned subsidiary, BTC Trust Company of South Dakota
- Serving trust and wealth management clients nationwide
- Office locations in 6 states (Iowa, South Dakota, Arizona, Nebraska, Minnesota and Illinois)
- \$28 Billion in assets under administration
- Providing trust and asset administration services since 1917
- Account minimum: \$1,000,000. Minimum annual fee required

TRUST SERVICE OFFERINGS

- Directed and Administrative Trusts
- Domestic Asset Protection Trusts
- Dynasty Trusts
- Qualified Retirement Plans
- Non-Qualified – Rabbi Trusts
- Life Insurance Trusts
- Institutional Custody
- Corporate Trust Services
- Escrow and Paying Agent
- NAV Valuations

SPECIAL SERVICES

- Foundations / Endowments – Donor management services
- Fund unitization and accounting
- South Dakota situs

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