NEW YORK PRIVATE TRUST
A DELAWARE TRUST COMPANY

FREQUENTLY ASKED QUESTIONS

Is New York Private Trust Company ("NYPTC") a Delaware trust company?
Yes, NYPTC is a Delaware chartered trust company headquartered in Wilmington, Delaware. All trust administration activities take place in Delaware. The New York portion of our name is derived from our affiliation with Emigrant Savings Bank, a New York state chartered savings bank.

What other jurisdictions does NYPTC work in?
NYPTC can administer trusts governed by the laws of all U.S. jurisdictions.

Is NYPTC willing to delegate the investment function to a third party advisor?
Most Delaware trusts are directed for investments, but NYPTC is one of the few "directed" trust companies willing to delegate the investment function to the Investment Advisor who has referred the client.

What documentation is required from the Advisor to establish a delegated trust relationship?
NYPTC may require that a Delegated Management Agreement be executed. The Advisor will also need to craft an Investment Policy Statement specific to each trust account they manage.

What custodial platforms is NYPTC willing to work with?
NYPTC works with all custodians. We can work with the custodian of the Advisor's choosing. We do not require custody be held with NYPTC.

Does NYPTC sell any other products or services?
No, our focus is solely on trust administration. We never compete with the client's trusted advisors.

Is NYPTC willing to aggregate family relationships for purposes of applying fees?
NYPTC will combine and pro rate related family accounts for purposes of applying a basis point fee.

Is NYPTC willing to work with the client's other trusted advisors?
We work with the client's advisors, whoever they might be; Financial Advisor, Attorney, Accountant, etc.

Does NYPTC work with non-US clients?
Yes, NYTPC possesses a wealth of experience dealing with cross-border planning issues. Roughly 30% of our business involves cross border trusts.

Does NYPTC assign a specific Trust Officer to an account?
Yes, NYPTC assigns a specific Trust Officer (TO) to each trust account. This is the primary point of contact for the referral source and their client. The TO is supported by a Trust Administrator and Cash Processor. We also try to maintain a consistent Trust Officer assignment across Investment Advisory firms and client relationships.

To learn more, contact New York Private Trust today.

Timothy Carroll, President & CEO
(302) 792-4735 • CarrollT@NYPTrust.com