



NEW YORK PRIVATE TRUST

A DELAWARE TRUST COMPANY

FIDUCIARY SERVICES

Deciding who will assume responsibility for your family and financial affairs if you cannot do it yourself is one of the most difficult and personal decisions you will ever make. Determining whether an individual or institution will act as your fiduciary is usually the first or an early step in financial or estate planning and may well be one of the most important. The benefits of naming a corporate institution as your executor and trustee, particularly when the corporate institution is acting with a family member as co-fiduciary, often ensures that the administration of your estate or your family's trusts is handled with the technical expertise and sensitivity to family issues necessary to carry out your estate plan in the manner you intended.

New York Private Trust offers a complete array of trust services, including, acting as executor of an estate, administrative trustee (i.e. as trustee with third-party investment management), full trustee (acting as trustee with full investment duties), trustee of charitable remainder or foundation trusts, as well as trustee of life insurance trusts, Rollover IRA accounts (both self-directed and discretionary accounts), Dynastic Trusts and Asset Protection Trusts. Our staff of fiduciary experts has extensive, in-depth experience administering sophisticated trusts and estates including non-traditional fiduciary assets such as real estate interests, operating business interests, partnerships, oil and gas interests, or alternative investments. Unlike some corporate fiduciaries, we do not feel obligated to sell such assets immediately. Instead, we use the advantage of our experience and resources to determine how to best maximize value for the family, even if it means continuing to hold such assets in trust.

Our actions as a fiduciary are predicated on always acting in your and your family's best interests. We believe a corporate fiduciary can do so only if it remains objective and avoids any potential conflict of interest. We do not invest client funds in proprietary investment products.

We believe that proprietary product investing raises, at a minimum, the perception that the investment benefits the corporate fiduciary individually to the detriment of the trust beneficiaries.

Our Delaware situs provides the benefits of a trust jurisdiction that is forward thinking, innovative and respected in fiduciary and investment matters. Moreover, Delaware has a nationally respected judicial system known for corporate and trust oversight, and a well developed body of case law governing trust administration and corporate matters. Our Delaware situs allows an individual to create trusts having a perpetual duration, asset protection capability, flexibility in financial planning and investment management, as well as favorable tax treatment by eliminating or reducing state fiduciary income tax under some circumstances.

FOUNDATION ADMINISTRATION

To enable families to achieve their philanthropic vision, New York Private Trust Company alleviates administrative burdens and barriers through a comprehensive array of services, including:

- ❖ Create / restructure organizational governance
- ❖ Documentation and Federal / State filings
- ❖ Investment Consulting
 - Asset Allocation
 - Manager Selection
- ❖ Performance monitoring and reporting
- ❖ Ongoing grant administration and disbursement
- ❖ Custody and asset reporting
- ❖ Tax planning and preparation

We welcome the opportunity to work with you and your advisors in exploring ways in which New York Private Trust's team of fiduciary experts can assist you in reaching the right decision for you and your family.