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Calamos Wealth Management Forms Calamos Private Trust to Provide Suite of Trust Solutions

Naperville, IL, July 17, 2018 Calamos Wealth Management, a full-service wealth advisory firm serving individuals and families, announced today the formation and launch of Calamos Private Trust which is set to offer a comprehensive suite of trust services to clients in all 50 states.

Calamos Private Trust is a Trust Representative Office of National Advisors Trust Company (NATC), an independent trust company with a national charter. Calamos Private Trust delivers a full range of trust and trustee services in partnership with NATC, with administrative trust services provided by NATC.

“Adding trust services brings additional breadth to our already comprehensive approach to investment management and wealth advisory services,” said Jim Baka, President of Calamos Wealth Management. “Trusts are a regular feature in the highly customized solutions we plan and implement for our clients. By offering trust administration services through Calamos Private Trust, we can provide our clients with greater ease and convenience in carrying out their estate plans and in solutions to other financial needs.”

Trust and trustee services are provided under a directed trust model—an approach that emphasizes a team of experts working in conjunction to serve a trust’s beneficiaries. Each expert serves as a fiduciary, specializing in a particular area such as investment management. This emphasis on fiduciary specialization sets apart the directed trust model from bundled trust services traditionally offered by bank trust departments.

Baka said, “Under the directed trust model, our wealth advisors are able to serve as investment managers of trust assets if requested to do so by clients. In this way, we can combine investment and trust services in a more effective way as we serve families over multiple generations.”

About Calamos Wealth Management

Calamos Wealth Management LLC provides comprehensive investment and wealth advisory services to individuals, families, and small to mid-size institutions including foundations and charitable endowments. Services include investment advisory, comprehensive wealth planning, risk management, and generational wealth transfer, among others needed to meet the needs of its diverse clientele. Calamos Wealth Management headquarters are located in Naperville, Illinois with additional offices in New York and Florida. The firm is a wholly owned subsidiary of Calamos Investments LLC. Learn more at

www.calamos.com/wm. To learn more about Calamos Private Trust visit
www.calamos.com/wm/CalamosPrivateTrust (to be activated)

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