

Filbrandt & Company partners with National Advisors Trust Company to expand trust services

New private-labeled trust services brand formed: Filbrandt Private Trust

MADISON, Wisc. (June 1, 2017) – Filbrandt & Company today announced that it has partnered with National Advisors Trust Company (NATC) and become a shareholder in National Advisors Holdings, Inc. The partnership significantly expands Filbrandt & Company's trust solutions as part of the company's holistic approach to providing world-class wealth management services to valued clients. With NATC's national charter, Filbrandt & Company's clients have access to expert trust services in every state, allowing them a nationwide choice of the most tax-favored trust situations to fit their needs.

Filbrandt Private Trust

Filbrandt is implementing NATC's exclusive Trust Representative Office (TRO) program. The TRO program allows Filbrandt & Company to market a full range of branded trust and trustee services through its new private label, Filbrandt Private Trust, with administrative trust services provided by NATC.

"With history's largest generational wealth transfer underway, there is an increased need to provide our clients with expert trust solutions that fulfill their wishes, and define and protect their legacy today and for the future," stated Michael J. Filbrandt, Chairman of the Board of Filbrandt & Company. "With our new private label, Filbrandt Private Trust, we are able to provide complete trust services to clients to facilitate their wealth transfer and estate planning objectives, in addition to our extensive wealth management solutions."

Mr. Filbrandt continued, "By marketing trust services under our own brand, Filbrandt & Company is able to offer clients a seamless and embedded solution within our integrated scope of services. Our firm's goal is to establish lifelong relationships with clients, their families, and others who are important to them. As a best-in-class partner, NATC provides us with comprehensive trust solutions that expand our ability to deliver expert wealth management services to our growing number of clients over multiple generations."

The partnership

NATC is dedicated exclusively to serving as an integrated complement to wealth management firms by providing trust services that help bring advisers closer to their clients with deepened relationships that lead to client retention through generations of wealth transfer.

According to Jim Combs, CEO of NATC, "It's a privilege to be working with a wealth management firm like Filbrandt & Company that is devoted to serving clients. By always putting their clients' needs first, Filbrandt & Company has built trusted and long-lasting relationships with loyal clients who choose their firm because of their absolute commitment to helping every client attain their personal goals. With the addition of NATC's trust solutions, and the launch of their new trust services brand, the firm has a strong differentiation that will enhance and solidify their reputation as world-class experts and a one-stop resource for clients."

Advantages of NATC's Unbundled Trust Model

NATC partners with trusted advisers in a corporate directed trustee (CDT) model wherein the adviser owns the client relationship and all investment activities, and NATC delivers complete trust administrative services.

"NATC's CDT unbundled approach is a powerful trust model that gives clients the ability to maintain Filbrandt & Company as their investment firm, while having the comfort and stability of NATC, a regulated financial institution, serve as administrative trustee," said Patricia J. Filbrandt, President of Filbrandt Investment Advisers. "Additional specialists can be involved if there is a need for a distribution adviser or trust protector in the management of the trust. NATC's unbundled approach allows a high level of flexibility and control, and has better checks and balances than other trust models."

Shareholder in National Advisors Holdings, Inc.

Becoming a shareholder in National Advisors Holdings is further evidence of Filbrandt & Company's commitment to trust services and to its partnership with NATC.

"We were enthusiastic about the opportunity to invest in NAH and establish an ownership position as part of our allegiance to the partnership," Mrs. Filbrandt explained. "It underscores our intention to fully engage with NAH in a true partnership relationship. There's a great synergy between our companies' values and culture, our client-focused approaches and commitment to excellence."

About Filbrandt & Company

Filbrandt & Company, located in Madison, Wisc., specializes in providing comprehensive financial planning services to university professionals nationwide. Filbrandt & Company serves committed investors with complex financial needs. Our multigenerational team of experienced and credentialed professionals delivers innovative solutions through The Filbrandt Total Solution© to enhance and preserve wealth. For more information on Filbrandt & Company, visit www.filbrandtco.com.

About National Advisors

Enriching Lifelong Relationships with trusted advisors and the clients they serve unites and unifies the people of National Advisors. We embrace our clients, delivering a seamless, consistent experience across our family of companies:

National Advisors Holdings, Inc.

National Advisors Holdings, Inc., is the holding company for National Advisors Trust Company and National Advisors Trust of South Dakota, Inc.

National Advisors Trust Company

National Advisors Trust Company (NATC) is a premier, independent national trust company providing expert trust services and solutions to trusted advisers and the families they serve. For more information on NATC, visit www.natrustco.com.

National Advisors Trust of South Dakota, Inc.

National Advisors Trust of South Dakota, Inc. provides trusted advisers with progressive trust services for high-net-worth (HNW) and ultra-high-net-worth (UHNW) clients who wish to take advantage of South Dakota's unique trust jurisdiction opportunities for protecting and passing on wealth. South Dakota is the nation's top situs for asset and creditor protection. For more information on NATSD, visit www.natrustsd.com.

National Advisors Concierge Services

National Advisors Concierge Services (NACS) delivers third-party services to clients of NATC and NATSD.

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