



National Advisors Trust Company Named to Trust Advisors' 2017 America's Most Advisor-Friendly Trust Companies and Industry All-Stars Trust MVP Roster

Kansas City, MO (April 6, 2017) – National Advisors Trust Company, FSB (NATC) announced that it has been named to The Trust Advisor's 2017 America's Most Advisor-Friendly Trust Companies and included on the Industry All-Stars Trust MVP Roster included in the report.

According to Scott Martin, Editor-in-Chief of The Trust Advisor, the 27 companies in the report “are on the leading edge of technology and the delivery of high-net-worth solutions. Part of that leadership means a rock-solid devotion to advisor relationships. Calling these organizations ‘advisor friendly’ is actually an understatement. These trust companies are what we call ‘advisor friendly’ because they’d rather cooperate than compete.”

Martin continued, “There are hundreds of trust service providers in today's landscape and at a glance 90% of them are nowhere near what we'd even consider receptive to the wealth management community. We drill down to somewhere around the top 1% of the industry to find those that truly want to cooperate with outside professionals in pursuit of better all-in-all outcomes for clients and everyone else. Including NATC in that elite group didn't require a whole lot of debate. The company has been all about advisors from Day One – the advisors are right there in their name, between their national charter and the trusts they serve. What's exciting is watching them keep innovating every year, pushing the industry standard into the future and continually coming up with new ways for advisors and trust officers to work together.”

The Trust MVP Roster in the report named 14 companies, including NATC, that were recognized for their innovation and leadership in the trust industry. “These are the people with their finger on the pulse of the future,” said Martin. “They’re some of the most valuable players in the industry (MVPs). And we’ve surveyed them in these pages to give you a sense of where they see that future headed.”

“The Trust Advisor is a leading publication in our industry providing valuable information and perspective for advisors,” said Jim Combs, President and CEO of National Advisors Holdings, Inc. and its affiliates. “Our advisors are faithful readers of The Trust Advisor because of its tight focus on our industry and the guidance and insight it provides for financial advisors. Being named one of America's Most Advisor-Friendly Trust Companies and being selected for the Industry All-Stars Trust MVP Roster in 2017 is an honor for NATC and a meaningful designation from a highly respected publication.”

EXCERPTS FROM THE REPORT

Some key points from the report's introduction written by Scott Martin include:

- “An advisor who knows how to work with trusts and has built relationships with the right trust companies is in a **better competitive position** than one who lacks those advantages.”
- “Trust services create the kind of **deeper, value-added relationship** that provides the long-term structure that **keeps clients from drifting away**. Assets held in trust can remain in place in **perpetuity**, accumulating wealth across multiple generations of clients and **keeping the fees flowing for decades**.”
- “Advisors’ clients want a holistic approach with specialized expertise. One of the top items on their **wish list** is the ability to **use trusts**.”
- “With the right partner, your core role is to introduce the trust concept to your clients. **You don't have to be the expert** on a technical level. The trust company will handle all the detail anyway. All you need to do is **start the conversation**: ‘Are you familiar with what a trust can do for you?’”



- **“Barely 10% of advisors work with trusts.”**
- “Top-tier trust companies are seeing advisors step up their **cooperative efforts with other professionals** who have a voice in wealth families’ finances. **Attorneys and accountants** [centers of influence] play critical roles in the trust creation process and need to **bring in advisors** to manage the investments.”
- “Not surprisingly, most of you want to open up your business to support trusts for very simple reasons: a wider offering makes it easier to **court new clients**, encourage existing relationships to **trust you with more of their assets** and **generate more revenue** on every dollar of AUM on your platform.”
- “A full **82%** of our readers say finding a **trust company they can recommend** to their best clients has translated into **new relationships, enhanced account retention or both.**”
- “You need to find a **trust company partner** that can work with your clients **wherever they live.**”

The report also included important statistics and survey results including:

- How trust companies help advisors land new accounts
- What makes a trust company advisor-friendly
- What to look for in picking a trust company partner
- A guide to selecting the right trust for a variety of planning needs
- The advisor-friendly trust structure

To download the full report, visit http://hosted.thetrustadvisor.com/AFTC-2017_AFTC-2017-LANDINGPAGE-NATC.html

About National Advisors

National Advisors is a family of companies providing expert nationwide trust, custody and concierge services to trusted advisors and the families they serve. National Advisors is comprised of the following entities: National Advisors Trust Company, FSB; National Advisors Trust of South Dakota, Inc.; National Advisors Concierge Services; and National Advisors Holdings, Inc. *Enriching Lifelong Relationships* unites and unifies the professional staff of National Advisors. We embrace our clients with this common purpose, delivering a seamless, consistent experience across our family of companies. More information is available at www.natrustco.com, www.natrustsd.com, www.natctro.com.

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