



Commonwealth Trust Company • 29 Bancroft Mills Road, 2nd Floor, Wilmington, DE 19806 • [www.comtrst.com](http://www.comtrst.com)

Commonwealth is steadfastly committed to maintaining its independence as a Trust Company without an investment arm. The company has maintained its independence for more than 80 years which allows Commonwealth to focus entirely upon efficient trust administration and prevents conflicts of interest.

Through working with Commonwealth Trust Company you will have the advantages of Delaware: Trust Laws, Court System, Legal Case Precedents, Capital Gains and Income Tax Advantages.

The Commonwealth team is experienced and comfortable dealing with complex matters such as: closely held family-owned businesses, succession planning, dynamic family situations and international planning as well as complicated tax and accounting scenarios. Unlike other trust companies we do not outsource any administrative functions; all of our work is performed at our sole office in Wilmington, Delaware.

“Our independence, flexibility and experience are just some of the reasons that financial professionals, attorneys and their clients from all over the world enjoy working with Commonwealth and we plan to keep it that way,” explains President Cindy Brown and CEO Caroline Dickerson.

**New business contact:**

The Business Development Group:

James A. Harty, III

Kristen M. Powers

David R. Riebe

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**States licensed/chartered in:** Delaware only

**Total assets under administration:** \$16+ billion

**Custodians supported:** Works with all

**Number of relationships with advisors:** N/A

**Fee:** NOT based solely on asset value; tailored for each client, group and relationship in order to benefit the client and remain competitively priced

**In-house experts:** 4 Attorneys (3 with LLM and 1 with TEP designation), 5 Trust Administrators, 3 CPAs, 2 CBCs, 1 IRS Enrolled Agent, and 1 CTFA

**Trust accounting system:** AccuTrust

**Supports directed trusts:** Yes

**Support delegated trusts:** No

**Typical timeframe for acceptance of new trust:**

7-14 days (we perform due diligence upfront to expedite administration and future distributions)

**Marketing support includes:** Consultations, customized presentations, exhibiting, speaking engagements, on- and off-site meetings with clients and advisors, and webinars

