

## ADVISOR TRUST SERVICES

# America's most advisor-friendly trust companies

BOK Financial was named as one of America's most advisor-friendly trust companies by leading industry source, Wealth Advisor. Wealth Advisor is a leading source of news, commentaries and education to wealth managers and advisors. They publish a yearly report outlining the top trust companies that cater to registered investment advisors (RIAs), family offices and broker-dealer representatives.

In its 2024 report, Wealth Advisor named BOK Financial as one of the most advisor-friendly trust companies. Criteria for the listing was based upon technology, custodians, fees, in-house experts, advisor support, and more. 2024 marks the 10th time that BOK Financial has been named a top advisor-friendly trust company by Wealth Advisor.

### FOR MORE INFORMATION, CONTACT:

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### WHAT SETS US APART?

- Nationally chartered and able to serve advisors and their clients in all 50 states.
- A strong commitment to personalized and responsive service through experienced professionals.
- Administration of directed and delegated trusts as a sole or co-trustee.
- Expertise in administering personal trusts, special needs trusts, court created trusts, charitable trusts and may serve as agent for trustee.
- Ability to manage assets in complex estates: real estate, oil and mineral management, closely held, farmland, etc.

[BOKFINANCIAL.COM/ADVISORTRUSTLIBRARY](https://BOKFINANCIAL.COM/ADVISORTRUSTLIBRARY)

BOK Financial® is a trademark of BOKF, NA which operates as Bank of Albuquerque, Bank of Oklahoma, Bank of Texas and BOK Financial. BOK Financial Corporation (BOKF) offers wealth management and trust services through various affiliate companies and non-bank subsidiaries, including advisory services offered by BOKF, NA and its subsidiaries BOK Financial Asset Management, Inc. and Cavanal Hill Investment Management, Inc., each an SEC registered investment adviser. BOK Financial Corporation offers additional investment services and products through its subsidiary, BOK Financial Securities, Inc., a broker/dealer, member FINRA/SIPC, and an SEC registered investment adviser and BOK Financial Private Wealth, Inc., also an SEC registered investment adviser.

**NOT FDIC INSURED | NO BANK GUARANTEE | MAY LOSE VALUE**

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