ADVISOR TRUST SERVICES

Company overview

At BOK Financial Advisor Trust Services, we enhance the advisor-client relationship by providing objective trust administration solutions, while financial advisors deliver comprehensive investment management services with the flexibility of managing and holding trust assets with their preferred custodian.

ADVISOR TRUST SERVICES

BOK Financial Advisory Trust Services offers a dedicated department with experienced trust officers to support advisors and their clients. With an emphasis on personalized and responsive services, we take the time to develop valuable long-term relationships.

Our trust services can help you focus on what's most important — your clients. As you work with them to create a solid financial foundation, we'll partner with you to deliver what they need.

BOK FINANCIAL

Our trust services are backed by BOK Financial Corporation® (NASDAQ: BOKF), a diversified and prominent leader in the U.S. financial services industry. BOKF is headquartered in Tulsa, OK, with more than 200 locations nationwide.

NATIONALLY CHARTERED & ABLE TO SERVE IN ALL 50 STATES

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.

BOK FINANCIAL
ADVISOR TRUST SERVICES

Rosemary Hueser 888.957.6678 | RHueser@bokf.com
Randy Kimmel 877.957.1078 | RKimmel@bokf.com
BOKFINANCIAL.COM/ADVISORTRUSTLIBRARY