



Court-Created and Special Needs Trusts

When the need arises for a professional trustee experienced in the administration of Court-Created Trusts¹ and Special Needs Trusts², choose the experienced fiduciary professionals at BOK Financial Advisor Trust Services. Our trust officers have specialized education and professional designations. We administer each trust with the beneficiary's best interests in mind and tailor our services to the unique situation of each client, while allowing the trusted advisor to manage the trust assets on their preferred platform.

We offer a full range of trust services. We collect assets; review, audit and pay expenses in accordance with the trust instrument; collaborate closely with the client's trusted financial advisor, personalized to meet their specific goals; structure distributions to meet the client's needs; regularly communicate with the client, the client's family and financial advisor to make sure the client's needs are being met.

We deliver personalized management through a trust officer, the client's trusted financial advisor, as well as a specialty asset manager for assets such as real estate. Our goal is to ensure the administration of the trust complies with its terms and in a manner that allows disabled individuals to continue to qualify for Medicaid, Medicare, SSI, SSDI and state-specific waiver programs as appropriate.

Experienced administration

- Qualified trust officers with various professional designations and credentials
- Experience dealing with courts and administering trusts
- Commitment to serving as trustee of trusts under applicable state laws
- Specialized policies and procedures for administration of court-created and special needs trusts

Responsive and flexible

- Efficient processing of distributions to meet the individual needs of trust beneficiaries
- Collaborative approach with trusted financial advisors to meet the short and long term needs of beneficiaries
- Specialized solutions for individual situations



Empathetic support

- Understanding of and respect for the unique needs of the beneficiary
- Treatment with compassion and dignity
- Confidentiality for clients and their families

Strength and stability from BOK Financial

We're part of BOK Financial Corporation (BOKF), a near \$50 billion, well-diversified financial services holding company. We deliver banking services through our family of brands: BOK Financial, Bank of Albuquerque, Bank of Oklahoma and Bank of Texas.

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¹ A court-created trust might be necessary when a minor or incapacitated person is to receive money. ² A special needs trust, created in accordance with 42 U.S.C. Section 1396p(d)(4)(A), might be appropriate when a beneficiary would be eligible for government assistance programs like Medicaid but for the existence of the trust assets.

Investments and insurance are not insured by the FDIC; are not deposits or other obligations of, and are not guaranteed by, any bank or bank affiliate. All investments are subject to risk, including possible loss of principal. WM-570 03-2024