Advisor Firm Testimonials

BOK Financial Advisor Trust Services team has been very helpful in guiding and helping us navigate complex estate planning issues. Mike and his team are always there for us. We have learned so much throughout the course of our relationship and are grateful to be able to trust such a wonderful partner like BOKF. They are my firm's "go to" for all trust services related planning issues.

Adam Spiegelman, CFP®
Wealth Advisor, Spiegleman Wealth Management, Inc.

My experience with Kelly has been nothing but first class with a high level of expertise throughout our entire working relationship and a communication style that puts you at ease. You can tell that Kelly knows her subject matter in and out and also knows how to communicate that to everyone involved in a succinct, simple and coherent manner. She's responsive and always available for discussion whether it's administrative or strategic in nature.

J. Patrick O'Brien
Partner, Krilogy

BOKF, and with a specific call out to Darin Mitchell, have been one of the biggest blessings for our client. They assist us in the management of a Special Needs Trust, and their work consistently goes above and beyond the call of duty. They are responsive, caring, dependable, and persistent in doing whatever they can to be a resource for the advisor, the client, and the client's family. I could not recommend their services more and we (and our clients) are lucky to have found them.

Nicholas A. Ibello, CFP®, AIF®
Senior Financial Planner, Williams Asset Management

I found my clients really appreciate the independent "advisor friendly" trustee option. Being a Certified Financial Planner, my planning clients are already used to having their own team of independent and objective professionals from different companies (CPA, attorney, investment advisor, etc.). They want that separation for flexibility and no conflicts of interest. Having previous experience with the traditional, vertically-integrated model, I can tell you BOK Financial Advisor Trust Services model clearly puts me, the advisor, on my client's side of the table. Their initial onboarding process with the advisor is very thorough and really helps manage expectations as well as minimize surprises for both the advisor and the clients.

William G. Lawler III CFP ®
Financial Advisor, FSC Securities Corporation

BOK Financial Advisor Trust Services team has been a great partner in assisting LVM with insights on how to advise clients through their difficult irrevocable trust situations. BOKF has partnered with us to talk directly with clients and attorneys about best practices to improve trust relationships and lower costs. I greatly appreciate the value that the BOKF continues to bring to relationships and management of these issues.

Chuck Prudhomme, CFP
Principal, LVM Capital Management LTD

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