



Sukanya Kuruganti Ted Simpson

Focus has a **directed trust utility** for partner firm clients to benefit from multi-generational fiduciary services.

LARGE OPPORTUNITY

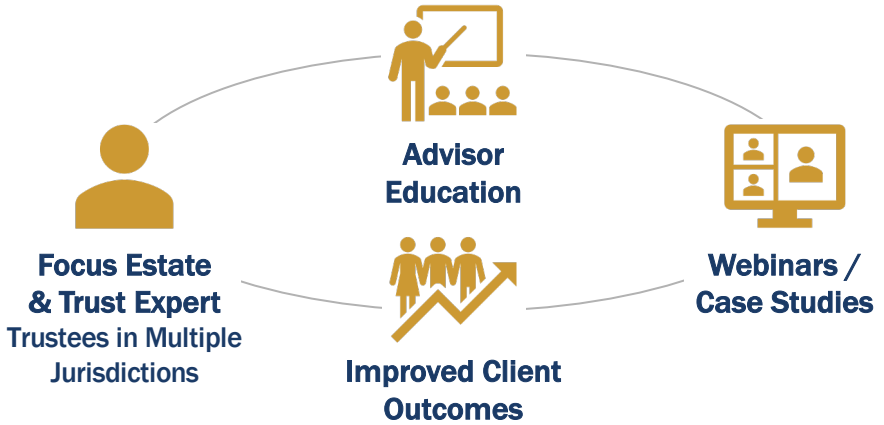
- ✓ Significant market opportunity to expand and retain client assets (**\$70T in assets will pass to NextGen via T&E by 2042**)
- ✓ Demand for a **DIRECTED** trustee solution:
 - Advisor friendly; flexibility for clients
 - Tax structure, asset protection, privacy
 - High quality service and low(er) prices

CLIENTS HAVE DIVERSE NEEDS

Successor and/or Co-Trustee	Directed/ Delegated Trusts	Executor/ Estate Administrator
State Income Tax Mitigation	Spousal Lifetime Access Trusts	Dynasty Trusts
Domestic Asset Protection Trusts	Charitable Trusts	Foreign Trusts
Irrevocable Life Insurance Trusts	Silent/Quiet Trusts	Special Needs Trusts
Timber/ Real Assets/ Commodities	Holding Companies	Personal Assets

BENEFITS TO FOCUS PARTNERS

- ✓ 6 best in class trust jurisdictions – **South Dakota, Delaware, Tennessee, Nevada, Alaska and New Hampshire**, plus 10 Foreign Jurisdictions. Can expand as needed
- ✓ 5 Reputable, advisor friendly, independent **directed trustees** with scale and expertise
- ✓ Focus network agreement with **best-in-class pricing** and service requirements
- ✓ Focus **Trust & Estate Specialist** to provide value added expertise to Focus Partners



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