Visible National Trust for Wealth Managers

Financial Professional Use Only

Visible NATIONAL TRUST

You have choices about how to manage the $6 trillion in client assets moving into special needs trusts (SNTs) during the generational wealth transfer.

Visible is the seamless special needs trust solution for clients with $1 to $5 million in investable assets that keeps you at the center of your intergenerational client relationships.

Benefits	Visible National Trust	Referral to outside Attorney	Broker Dealer / RIA In-house Trust Departments	Outside Trust Companies
Compensation for Wealth Advisors	Grow AUM fees or charge non-asset-based fees	None	Do not all handle special needs trusts	When Advisor provides investment services to trust company
Solution for $250,000+ Trusts	Yes, with no maximum funding	Incomplete non-turnkey solution, documents quickly become stale	Typically mandate high minimums	Minimums are typically $1 million or more
Dedicated Special Needs Trust Provider	Turnkey provider with deep expertise	Limited role as document creator	Typically requires advisor support	May have dedicated department
Transparent fees	Provided up front	Unpredictable legal fees	Varies by firm	Varies by firm
Deepen Multi-Generational Relationships and Grow AUM	Essential component of wealth and estate planning	N/A	Limited bandwidth to meet complex needs	Competitor for wealth business
Seamless Integration with Advisor Workflow	Advisors always stay at the center of the family wealth conversation	No.	Yes.	No.
Brandable	Yes.	No.	Yes.	No.

Schedule a discovery meeting today.

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