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Bridgeford Trust Company: A New and Emerging Wealth Management Service Paradigm

Operating as an administrative trustee and not as an asset manager or insurance provider, Bridgeford Trust Company is “advisor friendly” and a natural collaborator with investment managers, insurance professionals, and family/multifamily offices, working together in close synergy with financial planners, attorneys, and CPAs to bring powerful and sophisticated trust planning solutions to families across the country and around the world. Utilizing South Dakota’s Directed Trust, Trust Protector and Self-Settled Domestic Asset Protection Statutes, Bridgeford Trust delivers far more control to settlors of trusts, beneficiaries and their advisors than ever before, allowing them to use advisors of their choosing and hold non-traditional assets in trust, such as closely held stock, real estate and insurance. In addition, trust administration and client service is efficiently executed through an impressive team of highly experienced and detail-oriented trust professionals in a boutique and very responsive service model.

Leveraging the sophistication of South Dakota’s modern trust laws and status as a no income tax state, Bridgeford Trust engages compelling planning techniques, such as the Dynasty

Trust, Incomplete Non-Grantor Trust, and the newly enacted Community Property Trust. The Community Property Trust is a progressive structure allowing for a 100% step up in basis at date of death of the first spouse relative to property held in trust, thereby creating the opportunity to avoid state capital gains and federal estate tax forever within the protective entity of one of the nation’s best domestic asset protection structures, all while availing themselves of the strongest privacy laws in the country.

Considering heightened concerns around cost, international reporting requirements and the security of confidential information, brought to light most recently by the Panama Papers, and the fact that the United States has emerged as one of the safest tax and privacy havens in the world, Bridgeford Trust’s boutique and highly confidential service model, coupled with the power of South Dakota law, presents a compelling alternative to “offshore” planning for international and domestic families in need of sophisticated tax, asset protection and privacy solutions.

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BRIDGEFORD TRUST COMPANY, a boutique and independent trust company with South Dakota Trust powers, provides progressive trust administrative services to families across the United States and around the world. Bridgeford Trust delivers tremendous control and flexibility to settlors, beneficiaries, and their advisors through South Dakota’s industry leading modern trust laws, including directed trusts, self-settled domestic asset protection trusts, trust protectors, and decanting. Leveraging these modern trust laws and South Dakota’s powerful privacy provisions and favorable tax environment, Bridgeford Trust represents a new and emerging wealth management service paradigm built around true independence, collaboration, and world-class capabilities.