

Business Trust Services

Your business represents your lasting legacy. We counsel you in managing the orderly transfer of your estate and assist with the evaluation of various methods to reduce taxes and obtain other planning benefits. Your Private Banker will help you maximize opportunities arising from the sale or purchase of business interest, stock options, real estate or other asset classes.

Our business was founded on lasting relationships and highly individualized service through Trust Services. We have a well earned reputation for our ability to administer trusts and business services and a significant track record for delivering on your long-term objectives. Our services include Life Insurance Trusts, Key Executive, Non-Qualified Employee Benefit Trusts and Family Business Succession.

Asset Management

Discretionary investment options permit us to tailor investments to your unique financial goals. We also practice tax-sensitive investing when you sell appreciated assets.

If your account consists primarily of stocks and bonds, we employ the services of our affiliate, First Foundation Advisors or other non-affiliated Registered Investment Advisors, to meet your needs.

If your goal is a fully diversified asset sector portfolio, our comprehensive trust asset management includes: Alternate Assets (such as hedge funds), Real Estate and Mineral, Oil & Gas Interests.

Business Escrow Services

We provide Business Holding Escrow Services to ensure that all parties receive the benefit of their agreement.

Deferred Non-Qualified Compensation Trust

An irrevocable trust that safeguards the assets of a non-qualified benefit retirement plan.