

Life Insurance Trust Company Advantages

Life Insurance Trust Company, LLC (LITCO) is the first trust company in the country focused exclusively on life insurance trusts. LITCO provides fiduciary services to grantors and beneficiaries while working closely with the client's advisor. Our fiduciary and service platform go beyond typical corporate trustee services.

A Premier Corporate Trustee

Licensed and regulated
South Dakota situs to take advantage of progressive trust laws
Trustee in perpetuity
Supported by the largest ILIT back office in the country (ITM | 21st)
Co-trustee arrangements
Independent and objective – we do not sell insurance

Grantors and Beneficiaries are Valued

Access to trust and policy experts
Work with client's advisor to reach client's goals
Competitive trustee fee
Each trust is assigned a Trust Officer and insurance specialist to help you navigate the complexities of TOLI

Delivering Expert Insurance Trust Administration

Proven administrative processes and procedures
Efficient and timely gift and Crummey letter distribution
Trust document review
Extensive document storage

- Legal documents
- Insurance policies
- Gift and Crummey letters
- Client and Advisor communication
- Policy illustrations
- Annual statements
- Account statements

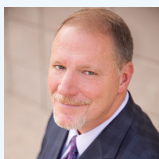
Unparalleled Policy Protection and Management

Comprehensive annual policy review and report
Continuous monitoring and policy remediation
Longevity and life expectancy analysis
Insurance premium optimization
Cost of insurance increase experts

Welcomed Advisor Engagement

Strategic partnerships and alliances
Efficient trust approval and acceptance
Copies of trustee and client communication
Remediation request notification
Term conversion reminder
Notice of life settlement potential
Will work with Advisors on policy comparison and replacements (if needed)

To find out how Life Insurance Trust Company can help you and your clients succeed with your life insurance trusts, contact Leon Wessels.



LEON WESSELS

CORPORATE DEVELOPMENT MANAGER

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