

# We Manage

The Complexities  
Of Irrevocable  
Life Insurance Trusts  
For You.



Questions:

888.320.9594

[info@lifeinsurancetrustco.com](mailto:info@lifeinsurancetrustco.com)

## Services

Life Insurance Trust Company Provides Targeted Fiduciary Services  
And Administration For Life Insurance Trusts And Policy Assets.



### Pre-Acceptance Policy Review

Review completed prior to the purchase of new policies and/or acceptance of an in-force policy into a new or existing trust.



### Premium & Crummey Notices

Notify grantors when gifts for premiums are due and handle Crummey notices.



### Trust Management Report

Grantors, beneficiaries, and advisors (if desired), receive an annual report with pertinent policy information and account activity.



### Annual Policy Review

Focused review with clear and actionable information regarding policy risks and potential improvements.



### Professional Services

Each account will be assigned a trust officer and a dedicated life insurance expert. You can reach out to an insurance or trust specialist any time you have a question.



### Policy Remediation

Our team of insurance experts works to provide solutions for troubled policies and complex insurance planning needs.

# Our Advantage



## Independent and Objective

- We do not sell Life Insurance
- Non-biased Policy Reviews
- Trust Management Reporting



## Insurance Policy Experts

- Policy Remediation Team
- Comprehensive Annual Insight Policy Reviews



## South Dakota

- Lowest state premium tax
- No state income tax
- Top rated policy statutes
- Progressive trust laws
- No rule against perpetuity (RAP)

## We Serve

- ✓ Grantors and Beneficiaries
- ✓ Certified Public Accountants (CPAs)
- ✓ Attorneys
- ✓ Family Offices
- ✓ Banks & Trust Companies
- ✓ Registered Investment Advisors (RIAs)
- ✓ Investment Advisors
- ✓ Insurance Agents

## Explore Life Insurance Trust Company

Life Insurance Trust Company is the first trust company in the nation to focus exclusively on managing ILITs. As such, we provide in depth policy management and trust reporting services that are backed by the strength of our parent company, ITM TwentyFirst, the largest manager of life insurance policies in the U.S. Driven by dedicated experts, Life Insurance Trust Company is focused on providing fiduciary services to grantors and beneficiaries of Irrevocable Life Insurance Trusts (ILITs).



For More Information  
Contact Us At:



an itm | twentyfirst company

**Life Insurance Trust Company, LLC**  
5132 S Cliff Avenue, Suite 6.  
Sioux Falls, SD 57108  
P: 888-320-9594  
W: [www.lifeinsurancetrustco.com](http://www.lifeinsurancetrustco.com)