

We Manage The Complexities Of Irrevocable Life Insurance Trusts For You.



Questions:

888.320.9594

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).



A **longevity** COMPANY

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For More Information Contact
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