

Brighton Jones®
Trust Company



Who We Are & Why We Exist

Brighton Jones Trust Company

At Brighton Jones, our mission is straightforward and bold: *we are a team that helps our clients, colleagues, and global community live richer lives.*

Brighton Jones Trust Company (“BJTC”) brings that mission into the world of trusts.

Trusts are often experienced as technical, intimidating, and overwhelming. Brighton Jones built BJTC to be the opposite: approachable and human. BJTC combines deep technical expertise with plain language, clear expectations, and ongoing conversations with your family; allowing us to stay deeply invested with your family story and evolve with your needs.

As a South Dakota chartered, regulated trust company, we pair one of the country’s strongest trust jurisdictions with a fiduciary duty to act in your best interests. BJTC is comprised of an internal team of experienced professionals, including CPAs, lawyers, and certified financial planners, who are dedicated to helping you and the people you love live a richer life.





What a Trust Does for Your Family

A trust addresses three big questions:

1. What do we want this wealth to do?
2. Who is it here to support?
3. How will decisions be made—today and long into the future?

When drafted and administered correctly and thoughtfully, a trust can:

- Protect assets from lawsuits, creditors, and life's curveballs
- Support loved ones who may be young, inexperienced, or vulnerable
- Reduce friction and confusion in moments of transition
- Translate your values into clear, durable guardrails
- Help rising generations grow into prepared, confident owners
- Reduce estate tax and leverage gift and generation-skipping transfer tax exemptions

Our Services

We tailor our involvement to what best supports your trust structure and your family's priorities. BJTC can serve as:

- Full Trustee
- Directed Trustee
- Co-Trustee
- Successor Trustee
- Trust Protector

Why a Corporate Trustee

Challenges can arise when a family member or friend serves as trustee. While well-meaning, these individuals can carry a heavy load: lack of expertise, time, emotional dynamics, and liability.

A corporate trustee offers:

- Continuity beyond any one person's lifespan or availability
- Professional process around distributions, records, and tax coordination
- Neutrality when there are differing needs and perspectives across the family
- Deep technical expertise
- Compliance and oversight in a rapidly changing legal and tax landscape

Trust management is our core business and we help provide our clients peace of mind.



Why South Dakota?

When creating a trust, the trust situs and governing law of the trust are important considerations. Trust laws vary by state, and the applicable state law will govern things such as state taxation, trustee liability, and beneficiary rights to information and reporting.

South Dakota is widely recognized as having a state government that supports innovative and taxpayer friendly trust laws. Families choose to create their trusts under South Dakota law because it offers:

- No state income tax payable by trusts – trust assets can grow without state level drag
- Perpetual (“*dynasty*”) trusts – the ability to support multiple generations over time without limit on how long the trust can last
- Strong asset protection – including self-settled asset protection trusts in certain cases
- Modern, flexible trust laws – directed trusts and modification of otherwise irrevocable trusts via decanting and non judicial modifications
- Privacy and confidentiality – permanently sealed trust records for court matters involving trusts

You do not need to live in South Dakota to benefit from South Dakota trust laws. If you name BJTC as trustee of your trust, we provide the nexus for you to take advantage of these laws, regardless of where you call home.



As a South Dakota–chartered, regulated trust company, BJTC can bring these advantages to families wherever they call home.

What You Can Expect From Us

Every relationship with BJTC is designed to feel clear, human, and tailored to your needs:

- A transparent and thoughtful onboarding process that clarifies roles and expectations
- Regular, understandable reporting and highly responsive communication
- Coordination with your Brighton Jones team and outside advisors
- A standing invitation to ask questions and discuss family changes and evolving needs

A Trustee Aligned With Your Richer Life

At its best, a trust is about care. It's a structure that helps support the people and purposes that matter most to you, long after the ink is dry.

Brighton Jones Trust Company exists to make that structure:

- Legally and technically sound
- Personal and human-centered
- Fully aligned with your mission to live a richer life, and to help the people you love do the same



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Jones®

Live a richer life.®

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