

# TOP REASONS TO USE PEAK TRUST COMPANY NEVADA SITUS

**ACCOUNT SIZE** - Peak Trust Company has no minimum requirement. Our team administers trusts from \$250,000 to over \$1 billion in size.

**CONFIDENTIALITY** - Nevada provides a high degree of confidentiality to grantors and trust beneficiaries.

**DECANTING STATUTE** - Nevada has powerful decanting laws to modify trust provisions and accommodate changing family needs.

**DIRECTED TRUSTS** - Our unbundled services allow you to keep your trusted financial advisor while utilizing our powerful trust statutes to protect your client's wealth.

**DOMESTIC ASSET PROTECTION TRUSTS** - Nevada offers powerful statutes (including no "exception creditors") providing excellent protection for self-settled spendthrift trusts and consistently ranks near the top in state DAPT rankings.

**DYNASTY TRUSTS** - Nevada provides the ability to minimize transfer taxes by creating a trust that can continue for up to 365 years.

**EXPERIENCE** - Peak Trust Company has been in business since 1997 and administers nearly 2,400 trusts nationwide.

## **FRAUDULENT CONVEYANCE**

**STATUTES** - Nevada has one of the most protective fraudulent conveyance statutes in the nation. A creditor has two years, or within six months of discovery, to bring action against the trust.

## **NEVADA INCOMPLETE NON-GRANTOR TRUST (NING)**

- This is a trust typically established by a resident of a state with a high income tax rate, in an effort to reduce their state income taxes. PLR 201320002 allows taxpayers to use Nevada situs to utilize this very powerful tax planning strategy by placing an asset that has appreciated or will appreciate into this trust. When the asset eventually sells, federal tax will be due, but not Nevada state tax. Alternatively, the trust can hold assets that generate annual income, while sheltering that income from state tax..

**NO STATE INCOME TAX** - Nevada does not have state income tax on trust income or gains.

## **PROTECTIVE LLC AND LP STATUTES**

- Nevada has one of the leading and most flexible limited partnership and limited liability statutes.

## **THIRD PARTY DIVORCE**

**PROTECTION** - Nevada law protects third party trusts from spouses who are divorcing beneficiaries.

**TRUST INCONTESTABILITY CLAUSE** - Nevada provides an effective method to eliminate challenges to trust provisions by beneficiaries and other individuals.

**PEAK TRUST COMPANY'S** experience and knowledge, in combination with Alaska's and Nevada's unique trust laws, allows us to develop very effective and flexible strategies to meet your needs and objectives. Come find out today how **Peak Trust Company** can develop a successful strategy for you.

**PEAK TRUST COMPANY**  
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# ABOUT US

**Peak Trust Company (PTC) serves individuals, families and their advisors by offering tax-favored trust situs in both Alaska and Nevada. We offer unbundled, flexible trust administration solutions and unparalleled investment management services for a competitive fee.**

We provide superior trust administration for trusts established pursuant to Alaska or Nevada laws and trusts of other states moved to either Alaska or Nevada (i.e. change of situs by naming/appointing PTC as trustee). Peak Trust Company can work with clients from all 50 states and most countries, without the need for either the trust grantor or the beneficiaries to reside in Alaska or Nevada. No travel to either state is required to set up or maintain a trust with PTC.

Our staff is made up of highly experienced and credentialed trust professionals. Our goal is to build solid relationships by providing flexible, personalized service that can accommodate life's many changes. Peak Trust Company has always looked to offer clients options, flexibility and great service. **The ability to choose a jurisdiction that is best for you or your client (Alaska and Nevada) is the latest pledge to continue this tradition.**

*At Peak Trust Company, your trust is our core business.*

# TOP REASONS TO USE PEAK TRUST COMPANY ALASKA SITUS

**ACCOUNT SIZE** - Peak Trust Company has no minimum requirement. Our team administers trusts from \$250,000 to over \$1 billion in size.

**COMMUNITY PROPERTY TRUSTS** - Alaska is only one of two states to allow for Opt-In Community Property Trusts, which allows a couple to reduce possible income and capital gain taxes by receiving a double step up in basis.

**CONFIDENTIALITY** - Alaska provides a high degree of confidentiality to grantors and trust beneficiaries.

**CREDITOR PROTECTED IRAs** - Alaska allows for creditor protected IRAs even for those who live in states that do not provide creditor protection for IRAs.

**DECANTING STATUTE** - Alaska has powerful decanting laws to modify trust provisions and accommodate changing individual and family needs.

**DIRECTED TRUSTS** - Our unbundled services allow you to keep your trusted financial advisor while utilizing our powerful trust statutes to protect your client's wealth.

**DOMESTIC ASSET PROTECTION TRUSTS** - Alaska was the first state to provide for Self-Settled Spendthrift Trusts (Domestic Asset Protection Trusts) and is the only state in which a self-settled trust has received a Private Letter Ruling (PLR 200944002) from the IRS acknowledging that assets put into such a trust will not be includible in the grantor's estate.

**EXPERIENCE** - Peak Trust Company has been in business since 1997 and administers nearly 2,400 trusts nationwide.

**FRAUDULENT CONVEYANCE STATUTES** - Alaska has one of the most protective fraudulent conveyance statutes due to the time limit allowed for a creditor to bring action against the trust.

**LIFE INSURANCE TRUSTS** - Alaska has one of the lowest life insurance premium taxes in the nation, thus making Alaska one of the best jurisdictions for such trusts.

**NO STATE INCOME TAX** - Alaska does not have state income tax on trust income or gains.

**PERPETUAL (DYNASTY) TRUSTS** - Alaska does not have a rule against perpetuities, which minimizes transfer taxes by creating a trust that can continue indefinitely.

**PRE-MORTEM PROBATE** - Alaska allows for probate to be administered prior to death, thus eliminating will contests.

**PROTECTIVE LLC AND LP STATUTES** - Alaska has one of the leading and most flexible limited partnership and limited liability statutes.

**TRUST INCONTESTABILITY CLAUSE** - Eliminates challenges to trust provisions by beneficiaries and other individuals.

**PEAK TRUST COMPANY'S** experience and knowledge, in combination with Alaska's and Nevada's unique trust laws, allows us to develop very effective and flexible strategies to meet your needs and objectives. Come find out today how **Peak Trust Company** can develop a successful strategy for you.

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