Elevate Your Business Above the Competition by Offering Bespoke Trust Services

In today's highly competitive financial-services landscape, firms are constantly looking for ways to attract, deepen, and retain relationships with affluent families. One of the most powerful ways to do that is by offering Trust Services—a multi-generational wealth strategy that differentiates your firm while unlocking a high-value revenue stream from High-Net-Worth (HNW) and Ultra-High-Net-Worth (UHNW) clients.

Building a trust company on your own, however, is costly, complex, and highly regulated. That's where Clermont Trust USA comes in. We provide the full trust-company infrastructure, so you don't have to—eliminating the need for large capital investments, regulatory build-out, or additional staffing.

Our partnership model is simple and powerful: You remain the trusted advisor, maintaining client relationships, investment management, and your existing fee structure. Clermont Trust USA serves as the fiduciary and trust administrator, handling everything behind the scenes—from trust operations and compliance to accounting, tax reporting, and distributions.

The result feels like you've created your own private trust company, fully integrated into your business without disrupting the client experience. Our Pro-Advisor Trust Services strengthen your client relationships, expand your capabilities, and elevate your brand in the marketplace.

As this new trust platform grows, we also support your business through a relationship-management revenue share, helping you build a meaningful and recurring second line of business.

Partner with Clermont Trust USA—and turn fiduciary excellence into a powerful growth engine for your firm.

THANK YOU

For further information, please contact:

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