HOW MANY OF YOUR CLIENTS ARE USING MULTIPLE MANAGERS?

Did you know…. the average financial advisor has only about a quarter of his or her client's assets under management, according to Tiburon Research?

Did you realize…that many clients use multiple managers to advise on their investments?

Did you know…there's a way you can protect your asset base while delivering a full-service investment strategy for your clients?

Do you...have clients who are looking for a trustee that will partner with multiple managers?

Founded in 2001, Cumberland Trust is an independent trust company that allows clients to retain their own investment advisors. Our focus is on the beneficiaries, their needs, and their values rather than on managing financial assets. We believe that financial asset management and trust administration are different functions, requiring different skills and expertise, and so we offer a financial advisor-friendly platform wherein our services are provided in conjunction with the expertise provided by the investment advisor.

We believe in being a valued mentor and advisor to you and your clients.

By focusing on a team approach to trust management, Cumberland Trust collaborates with industry experts whether they are in real estate management, tax preparation, or investment management.

You work hard to attract clients. In Cumberland Trust, you will have a partner who will join with you in working hard to keep them.

To learn more about Cumberland Trust's unique platform, visit cumberlandtrust.com.

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