

A&M Trust Company: Built for Your Clients

A modern fiduciary platform built for families, complex balance sheets, and responsible stewardship of assets.

At A&M Trust Company, trust administration is more than recordkeeping. It is governance, judgment, and execution delivered with discretion. We combine institutional rigor with the agility required to serve families whose assets, structures, and ambitions do not fit a template.

Why A&M Trust Company: Our Differentiators

- 1 Decision-Making Speed:** A flat structure where owners are managing client relationships and are the decision-makers.
- 2 Responsiveness & Clear Communication:** Proactive communication and acting with a sense of urgency to match the needs of our clients.
- 3 Administration of Unique and Illiquid Assets:** Leveraging the operational expertise of A&M, we are comfortable with administering all types of assets, including real estate, closely held business interests, intellectual property, yachts and aircraft, and fine art and collectibles.
- 4 A Practical Risk Lens:** We view risk through the lens of the relationship we have with our clients. We always start with yes and execute with fiduciary discipline.
- 5 Breadth of Fiduciary Roles:** Ability to serve as trustee, co-trustee, executor or agent to trustee or executor. Will serve as a director or manager, or on PTC boards. Where appropriate and permitted, will serve under a durable power of attorney for financial matters.
- 6 Structures Tailored to the Client, Not Us:** We meet the family where it is; governance, reporting, and service are built around real needs rather than requiring things to fit into a rigid box.
- 7 Philanthropy In Action:** End-to-end support for private foundations, from formation and governance to administration, compliance and grantmaking due diligence.
- 8 Comfort With Concentration:** We understand modern wealth generation and are willing to work with concentrated real estate and operating company holdings by implementing thoughtful guardrails and monitoring frameworks.
- 9 Real Estate & Operating Company Know-How:** Operational and strategic expertise for trusts that hold active enterprises.
- 9 Private Trust Company Support:** Ability to advise on private trust company formation and implementation, providing A&M Trust's robust fiduciary experience and framework to help families professionalize their fiduciary structures.

Note: All services and roles are subject to legal, regulatory, and internal approvals and may vary by jurisdiction and trust instrument.

Contact Us



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