



**South Dakota Trust Company LLC • 201 South Phillips Ave., Ste 200, Sioux Falls, SD 57104 • [www.sdtrustco.com](http://www.sdtrustco.com)**

Founded by Al W. King III and Pierce H. McDowell III, South Dakota Trust Company LLC is a national boutique trust company headquartered in Sioux Falls with a satellite office in Rapid City and sister companies in Jackson Hole, Las Vegas, New York City and Westport, CT.

SDTC has more than \$110 billion in assets under administration and \$82 billion under agency and works with over 90 billionaire and 300 centimillionaire clients from 54 countries and 47 states. These high net worth families have chosen SDTC due to our exceptional service and flexible business model along with South Dakota's unique trust, privacy, asset protection, income tax, and private family trust company laws.

SDTC's founders each have over thirty-five years of trust experience and our trust officer's average more than twenty years of experience. Moreover, SDTC's trust officers are highly credentialed attorneys, accountants, and trust professionals who are trained and experienced in the areas of South Dakota trust administration. Each trust officer utilizes their extensive experience to supplement and facilitate communication with the client, the beneficiaries and the client's other investment, financial planning, legal, insurance, and tax advisors, acting as a relationship manager while customizing trust services individually for each client.

Because we do not offer any investment management products or services, we are able to work with any investment managers and custodians of the client's choice. Our architecture is truly open. We administer all types of non-financial assets, e.g., closely held stocks, limited partnerships, residential and commercial real estate, LLCs, oil and gas interests, offshore entities, etc.

In addition, sister company SDTC Services LLC leads the industry in the setup, operation and administration of both regulated (SD) and unregulated (WY and NV) Private Family Trust Companies.

**New business contact:**

Pierce H. McDowell III

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**States chartered/licensed in:** South Dakota

**Average account size:** \$18 million

**Total assets under administration:** \$110 billion

**Custodians supported:** SDTC works with all custodians of the clients' choice

**Number of relationships with advisors:** 2,500+

**Fees Annual minimum fee:** \$2,500 - \$5,000

**Fee scale:** Flat fees based upon labor, risk and other factors

**In-house experts:** 90+

**Trust accounting system:** Infovisa

**Supports directed trusts:** Yes

**Supports delegated trusts:** Yes

**Typical timeframe for acceptance of new trust:**

24-48 hours

**Marketing support includes:** Through its sister company, South Dakota Planning Company, SDTC provides support for sales, trust planning, training and client seminars as well as technical support for advisors/lawyers. Our business development team is always happy to provide support in any way we can with conference calls (telephonic or video), in-person meetings, presentations, webinars, promotional/educational materials, training sessions, etc.