COURT INVESTMENT SERVICES

What We Do

Court Investment Services is one of the nation's leading firms focused exclusively on fulfilling the needs of attorneys and fiduciaries that oversee court-related investment accounts. As a fee-based firm working in a fiduciary capacity, our mission is to serve as a trusted advocate and independent advisor, delivering value based on a prudent investment process and customized court-investing solutions.

- Flat, 1-percent annualized fee so you know your cost up front
- Independent, unbiased investment advice and no commission-based product sales
- Stable cash management investing process that offers low volatility, liquidity and competitive returns
- Consistent, process-driven client-service model that guides you through account consolidation and processing

Attorneys and fiduciaries face challenges when dealing with banks and investment managers that have little experience in servicing the specialized needs of court accounts. CIS helps navigate the complexities of **estates, special-needs trusts, settlement trusts, family trusts, conservatorships, guardianships, IRAs, 401(k)s** and more. We don't seek to earn commissions, charge hidden fees, sell credit cards, broker mortgages, recommend annuities, or pressure you into buying financial products that you don't need, want, or understand. Our narrow focus and broad experience enables us to recognize your needs and help you fulfill your fiduciary duties efficiently and responsibly.

Please contact us to find out how we can serve you.

Explore Our Services

Find out how we support our clients by consolidating assets and recommending prudent investment strategies

LEARN MORE

Account Types We Manage

If you oversee and manage a special-needs trust, estate, conservatorship, guardianship or another type of court account, we can assist you. We also work with IRA, 401(k), and other retirement accounts that also might fall under your control, including structured settlements, social security, pensions, or other income streams

LEARN MORE

Our Investment Strategies

Managing investments on behalf of others is a tremendous responsibility. By delegating that responsibility to us, we can help you meet your fiduciary duty and keep you compliant with court directives as well as relevant probate codes

LEARN MORE

Learn about our flat 1-percent annualized fee,
no account minimums. No fine print.

LEARN MORE

I’m an Attorney

Court accounts and probate is not a one-off business for us. Your time is precious and we get that. Click to learn more about the value we provide and what sets us apart

SEE HOW WE HELP

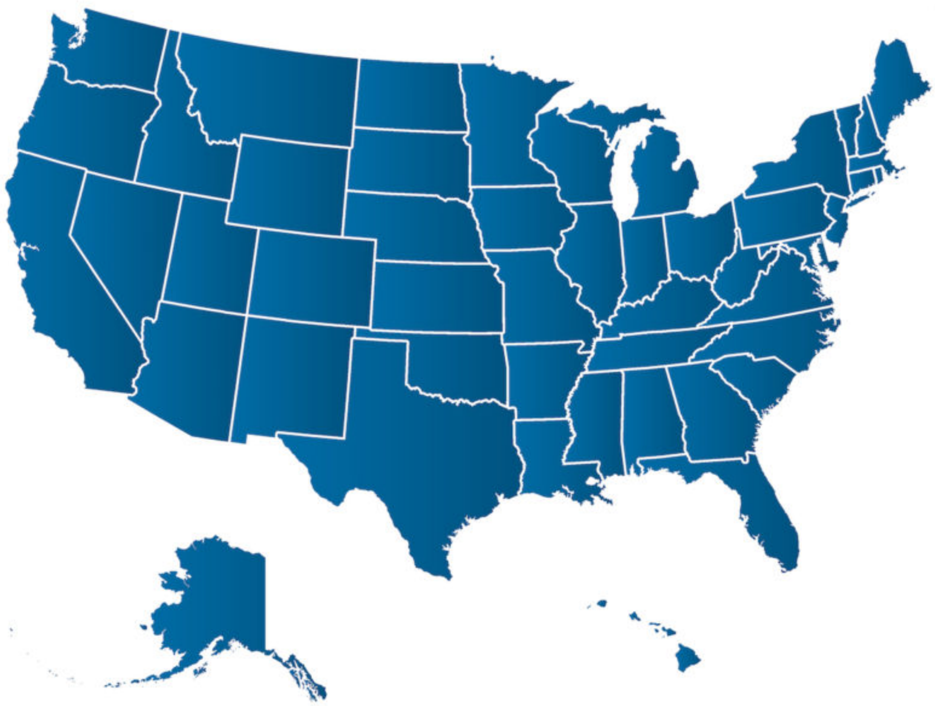
I’m a Fiduciary

The court has appointed you to play an important role in managing and protecting the assets of another. We can help you take control of these assets through a swift and organized process. Click to learn more about this elevating experience

SEE HOW WE HELP

Learn More About Who We Are

LET’S GO



Serving Clients Nationwide

- We work with clients and attorneys from California to New York, Washington to Florida, and everywhere in between
- We deliver value and satisfaction by being more efficient and proactive than what you might experience working with your local bank
- We understand the challenges of opening and servicing court accounts and offer streamlined processes to simplify your experience

How May We Help You?

Give us a call and let's chat about your situation. One of our staff in Newport Beach, Calif., will answer the phone — even late on a Friday afternoon!

Try us out.

CONTACT US NOW

We are an independent, fee-based, boutique investment firm that focuses exclusively on the needs of attorneys and fiduciaries. Our mission is to serve as a trusted advocate and advisor, delivering an experience that provides substantial value with a clear, competitive and straightforward pricing structure

FIDUCIARY & ATTORNEY RESOURCES

- Webinar: Different Investment Options For Your Client
- Download: Settlement Timeline for Estate Executors
- Download: 5 Questions to Ask Your Financial Advisor

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