

A photograph of a family walking on a beach at sunset. A man in a white shirt and shorts is walking on the left, a young girl in a white dress with a floral pattern is in the center, and a woman in a white shirt and dark pants is on the right. They are walking away from the camera towards the ocean. The sky is a mix of orange, yellow, and blue, indicating the time is either sunrise or sunset. The water is calm and reflects the light from the sky.

Create a Legacy – Plan for the Future

Who We Are

We are a non-custodial, non-depository retail trust company, licensed and regulated by the Nevada Financial Institutions Division. This means that client assets are held with a third party custodian providing the client the ability to independently monitor and verify trust assets. Investment management services for trust accounts under administration are provided by an affiliated company, Creative Planning, Inc (<http://creativeplanning.com>). Creative Planning, Inc. is one of the largest registered independent investment advisory firms in the country. Creative Planning has advisors in most states and clients in all 50 states. Creative Planning, Inc. has twice been named by CNBC as the top wealth management firm in the country and its founder and President has been featured three times by Barron's as the top independent advisor in the country. Legal and tax support is provided by two other affiliated companies; Creative Planning Legal (<http://creativeplanninglegal.com>) P.A. and Creative Planning Tax (<http://creativeplanningtax.com>), LLC.

Mission Statement

Creative Planning Trust Company provides its clients with comprehensive, compliant, cost effective and innovative trust services enhanced by the significant tax, asset protection and other planning advantages available to trusts domiciled in the state of Nevada.

Services*

We specifically offer services that include trust administration, accounting and recordkeeping, tax and reporting compliance, distributions and settlement. Our services are enhanced by the significant advantages available to trusts domiciled and/or administered in the state of Nevada; these include the lack of a state personal or fiduciary income tax, varied asset protection trust options, highly flexible trust decanting capabilities, and maximum flexibility in structuring dynastic multi-generational trusts. Leading estate planning commentators and professional journals regularly rank Nevada as one of four “top tier” trust situs jurisdictions in the country.

To learn more about our services and the benefits they can provide please call, email or mail us at:

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