For more than a decade, WealthTrust Oklahoma has provided fee-only, comprehensive, objective estate planning and asset management. As one of the largest independent trust companies in the country since 2001, our national charter allows us to meet the estate planning and financial needs of clients in all 50 states. Our local team has more than 40 years combined experience in the trust and investment industries. Our focus is to grow and protect our clients' financial legacy for the generations to come.

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WHAT IS A TRUST?

A trust is an estate planning tool that governs how assets are to be managed and sets forth the conditions that determine when cash or assets may be distributed. The intent is that these provisions carry out the wishes of the one who created the trust (Grantor) and would be how he/she would handle things during his/her lifetime. Read More

BLOG

Revising Estate Strategy Assumptions

When the rules of the game change, tactics should follow in response to the new landscape. While estate tax exemptions have ridden an uncertain roller coaster in recent years, the rules appear to be stabilizing, prompting many to reconsider conventional estate strategies.[1]

A Living Trust Primer

A living trust is a popular consideration in many estate strategy conversations, but its appropriateness will depend upon your individual needs and objectives.

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2952 Via Esperanza, Edmond, Oklahoma 73013 | (405) 241-1600