

# STIFEL

## Delaware Dynasty Trusts



In 1995, Delaware abolished its “rule against perpetuities,” which had previously limited the length of time a non-charitable trust could last. As a result, trusts in Delaware can hold property for successive generations, and theoretically last forever.

A Delaware dynasty trust designed to last multiple generations can have significant economic benefits for families because it avoids repeated exposure to transfer taxes each time wealth passes from one generation to the next.

Since 1995, other states have eliminated or modified their rules against perpetuities too. However, the availability of additional planning opportunities, such as asset protection trusts and directed trusts, makes Delaware trusts powerful planning tools for wealthy individuals and families.

As trustee, Stifel Trust Company Delaware, N.A. will:

Administer the Trust According to Its Terms	Custody and Prudently Invest Trust Assets	Collect Dividends, Interest, and Other Income
Make Payments to and For Beneficiaries	Prepare Fiduciary Income Tax Returns	Issue Monthly Statements

▶ We provide these services in close collaboration with your trusted Stifel Financial Advisor.

If you and your estate planning advisors believe that a Delaware dynasty trust might be appropriate for your estate planning goals, ask your Stifel Financial Advisor about Stifel’s trust services.

**Learn more at [www.StifelTrust.com](http://www.StifelTrust.com)**

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