

Who We Are

We are fiduciary specialists across the United States with extensive experience managing trusts for individuals, family entities and corporations. We are familiar with the oversight of fiduciary activities by the Office of the Comptroller of the Currency (OCC) and the examination practice of multiple state bank regulators. Our team has deep experience with both traditional trust companies and the broker/advisor relationship model for fiduciary accounts. We have a particular specialty in the “modern” trust states of South Dakota and Delaware.

What We Do

Consulting. From building a de novo trust company to managing a major trust institution The American Fiduciary Group (AFG) can assist you in structuring an effective, efficient, and audit compliant fiduciary solution for your organization.

Training. AFG can provide training for your relationship managers to better understand how to introduce fiduciary topics and work with the trust product.

Private Label. AFG can private label trust services for your organization.

Be your Trust Solution. AFG can be your trust company of choice, delivering first tier trust administration that does not compete with your organization on a client relationship level or asset management level.

Who You Are

You are a Family Office, RIA, Broker/Dealer, Asset Manager, or mature trust company looking to build a trust service; partner with fiduciary specialists to deliver a Trust product to you clients; or a mature trust company looking to make your existing fiduciary service more effective.

