Truxton Wealth

The Truxton Wealth team works with select high-net-worth individuals and their families to navigate life's complexities through structured, strategic financial planning. We don't sell products – we tackle difficulties and deliver solutions. Truxton Wealth commits to provide its clients with a reduced risk profile, minimized tax burden, and, most importantly, a streamlined, holistic wealth plan.

MANAGING YOUR FINANCIAL LIFE

Every Truxton client experiences a personal, hands-on, comprehensive approach for managing their wealth and everything that it intersects: family (children, spouses, grandchildren, etc.), taxes, retirement, real property, insurance, trusts, estates, philanthropy, and more. This integrated, all-inclusive formula represents the core of all of Truxton's corporate activities.

WEALTH ADVISORY

- Legacy Planning
- Business Advisory
- Retirement Planning
- Budget & Cash Flow Planning
- Tax Strategy & Mitigation
- Philanthropic Planning
- Estate & Trust Planning and Administration

INVESTMENT MANAGEMENT

- Investment Policy Development
- Portfolio Transition
- Institutional Investment Strategy
- Risk Management
- Non-Traditional Asset Management
- Tax-Efficient Management

FAMILY OFFICE SERVICES

- Trustee & Executor Services
- Long-Term Care Management
- Assistance with Life Events
- Intergenerational Planning
- Bill Pay & Concierge Services
- Private Banking Services
- Philanthropic Administration
- Family Education & Governance

DEDICATED, MULTIDISCIPLINED TEAM

Our steadily growing team is deliberately organized to oversee fewer clients to ensure a greater level of attention and service for each of our client families, promoting deeper relationships that extend across generations.

For each Wealth client, we bring you a curated team of specialists to support your day-to-day lifestyle needs and match your financial goals. Clients have access to a deep bench of wealth experts including credentialed financial planners and advisors (CFA®, CFP®, CTFA), tax specialists (CPA), and attorneys (JD).

30
wealth professionals

254
active client relationships

$7.9 MM
average client relationship

27 STATES
represented by client relationships

CONTACT

wealthmanagement@truxtontrust.com | 615-515-1700

THE TRUXTON DIFFERENCE

Truxton Wealth clients benefit from an exhaustive and comprehensive look at your finances, goals, and aspirations with the ultimate goal of achieving your near- and long-term financial and legacy goals.

ASSESSMENT

Review the current situation

- Review wills and trusts
- Inventory all assets and allocations
- Review entities and ownership structures
- Review tax returns and life insurance
- Define family goals
- Identify unique circumstances
- Review complete balance sheet

OPPORTUNITY

Identify opportunities to improve outcomes

- Recommend opportunities for wealth planning
- Create an appropriate investment policy
- Ensure proper asset titling
- Plan succession and governance
- Create an investment implementation plan

OPTIMIZATION

Implement and reassess as factors change

- Collaborate with attorneys and CPAs
- Recognize new circumstances
- Provide consistent feedback
- Optimize income and tax liabilities
- Keep organized and thorough records
- Know the stakeholders and help them understand the plan

TRUXTON 2024 Corporate Profile

Truxton Trust Company is a full-service bank and trust company, founded in 2004, that helps clients achieve prosperity and peace of mind by providing distinctive, comprehensive financial solutions. Truxton's mission is to do the right thing every day for clients.

The highest level of personal service is provided to clients through a vastly experienced team of professionals who are experts in personal and commercial loans, depository accounts, comprehensive wealth management and capital advisory services.

Over the years, Truxton's distinctive, consultative approach with clients has made it one of the fastest growing wealth management firms and one of the safest banks in the country.

Truxton At-A-Glance

- Founded in 2004
- OTCPK: TRUX
- 71 employees
- Headquartered in Nashville, TN with a wealth management office in Athens, GA
- Recognized by American Banker for twelve straight years as a top bank, measured by ROAE
- Ranked 9th Top U.S. community Bank nationally by American Banker in 2023

By The Numbers

$985 million
bank assets

$2.01 billion
assets under management

20.98%
return on average equity

45% of Truxton's Revenue
derived from managing families' wealth

1.82%
return on average assets

* As of 6/30/24