Solutions & Resources: Trust and Foundation Services

At Domani Wealth, we strive to see tomorrow the way you do. That's why we start each conversation by asking, "What does your tomorrow look like?"

To answer that, we've compiled some thoughtful questions to help you plan for the future and to gain insight on the services and experience we offer as an independent wealth advisory firm. Because at Domani Wealth, our focus is to lead you to a tomorrow filled with possibilities.

How will you carry out your mission of helping others?

Higher net worth families face unique planning challenges, including how to maximize the protection of their assets and how to determine the best options for their philanthropic interests. Trusts and foundations often play a strategic role in this planning, and both require careful consideration.

The Domani Wealth team can help with the evaluation of trusts and foundations and ensure that your best opportunities are focused on what's most meaningful to you. We do this by

- Clearly defining your giving intentions
- Leveraging our extensive knowledge in trust and foundations, including our network of resources and partners
- Meeting with experienced estate and trust attorneys and professional trustees to help shape your mission
- Carefully evaluating the benefits and potential disadvantages before committing to the establishment of a trust or foundation

Once your trust or foundation is established, we can assist with the investment of the trust or foundation assets. Our team can also support certain administrative and tax aspects of your entities, which often involve complex rules and regulations.

Start building tomorrow's legacy today.

TOMORROW'S OPPORTUNITIES START TODAY.

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Let the knowledgeable advisors at Domani Wealth help you achieve your asset protection and philanthropic goals in the most practical, efficient way possible.

IMPORTANT DISCLOSURE INFORMATION

Past performance may not be indicative of future results and different types of investments involve varying degrees of risk. Therefore, it should not be assumed that future performance of any specific investment or investment strategy (including the investments and/ or investment strategies recommended and/or undertaken by Domani Wealth, LLC), advice, or any non-investment related services, will be profitable, equal any historical performance level(s), be suitable for your portfolio or individual situation, provide security or prove successful. Domani Wealth is neither a law firm nor accounting firm, and no portion of its services should be construed as legal or accounting advice.

Please remember that it remains your responsibility to advise Domani Wealth, in writing, if there are any changes in your personal/ financial situation or investment objectives for the purpose of reviewing/evaluating/revising our previous recommendations and/or services, or if you would like to impose, add, or to modify any reasonable restrictions to our investment advisory services.

The scope of the services provided depends upon the needs of the client and the terms of the engagement.