American Estate & Trust

aetrust.com

Private Asset Custody for Family Offices

AET serves as a custodian, helping Family Offices enhance tax efficiency and streamline investment administration. From real estate and private credit to bespoke fund structures, we support both retirement and non-retirement accounts to meet the full breadth of a family's allocation strategy.

How AET Works with Family Offices

- **Sophisticated Tax Strategies:** Integrate private investments into IRAs, 401(k)s, trusts, and other qualified structures to support tax efficiency, generational planning, and long-term compounding across family entities.
- **Custom Structures for Complex Families:** Whether you manage direct deals, co-investments, private credit, or bespoke fund vehicles, AET supports a full range of private asset types.
- **Automated Administration at Scale:** Reduce operational burden with digital workflows for onboarding, transactions, compliance, and documentation, freeing your team to focus on allocation, due diligence, and strategy, not paperwork.
- **Multi-Entity Flexibility** Support complex ownership structures including trusts, partnerships, SPVs, foundations, and multi-generational accounts.

The AET Advantage

Family Offices require precision, flexibility, and institutional-grade controls. AET seamlessly fits into your existing processes, providing the custody, compliance, and infrastructure that support long-term family objectives.

- Qualified custody purpose-built for private and alternative assets
- Full visibility into account activity, audit trails, and asset status
- Secure, compliant movement of funds and documentation
- Technology that adapts to your governance framework

A Tech Suite that Works With You

Business Portal

Manage all private investments across entities, trusts, and generations from a single, consolidated interface. The dashboard gives your team clear visibility into capital flows, valuations, and account activity while AET handles custody, documentation, and compliance quietly in the background.

Client Portal

Family members and beneficiaries can access a streamlined, modern portal to review investment details, view documents and tax forms, update beneficiaries, initiate transfers, and monitor their private asset holdings in real time.

Contact Us Today!

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