

Safeguarding Your Investments

American Estate & Trust (AET) serves as the qualified custodian behind your investments, securely holding assets, maintaining compliance, and ensuring transparency. We work directly with your platform to streamline custody, onboarding, and reporting.

Why Platforms Work with AET

- **Security:** AET is a neutral third-party custodian, holding your assets in compliance with IRS and regulatory requirements.
- **Alternative Asset Expertise:** AET specializes in servicing complex private market investments, including real estate, private equity, precious metals, and more.
- **Retirement Accounts:** AET supports a wide range of retirement account structures (including IRAs and solo 401(k)s), while keeping reporting and recordkeeping clear and organized.
- **Modern Technology:** AET's technology standardizes investment flows, reducing errors and ensuring every investment is executed the right way.

What This Means for You

As an investor, your experience with AET is designed to be simple, secure, and transparent. We work behind the scenes with your platform to protect your assets and simplify every part of the investment process.

- Easily access required statements, tax forms, and confirmations
- See balances, status updates, and key activity at a glance
- Know exactly when money is sent, received, invested, or paid out
- AET provides the regulated custody and compliance behind the scenes

Security & Transparency

Safeguarding Your Assets

As a client, you'll receive secure access to your account through our online portal:

- Regulated and compliant
- Secure technology to support transactions
- Secure data management and storage

Secure Data

Protecting client information and instructions is a core obligation of AET. We build and operate our own core technology platform on modern cloud infrastructure, giving us direct control over data, systems, and process integrity.

Review our Trust Center [here](#) to learn more.