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**Your trusted
partner when it
matters most.**



ENTERPRISE TRUST
A LIDO COMPANY



**Enterprise Trust is a
corporate trustee that takes
an active, deeply engaged
approach to protecting your
family and your legacy.**



Acting in your best interest is our only business.

“We’re a trust company with a family office style approach. We’re nimble enough to know you and understand your aspirations, while also having the rigor and capabilities necessary to manage your trust and legacy.”

Mikkela Sweet, J.D., CTFA
Executive Vice President

Enterprise Trust is a regulated corporate trustee. We have the legal and ethical responsibility to act in the best interests of the trust and its beneficiaries.

From planning to settlement, we take an active role in every stage of the trust’s life. Our multidisciplinary team provides guidance, oversight, and support, ensuring your intentions are honored with clarity and consistency.



Philanthropic Legacy Planning

Margaret built a company from the ground up, and with it, an estate nearing a billion dollars. Her vision was clear: she wanted her family secure and her philanthropic commitments to endure long after her lifetime. But the complexity of balancing tax structures, multi-generational trusts, and charitable foundations left her unsure how to begin.

Enterprise Trust worked alongside her family and advisors to design a lasting plan, protecting her heirs while ensuring her philanthropic legacy remains a force for good for generations to come.



Guiding Generational Conversations

The Harper family had the resources to secure their future, but struggled to align on how wealth would be shared and responsibilities carried forward. Setting clear expectations proved challenging in the face of emotions.

Enterprise Trust created a roadmap for open, thoughtful dialogue, guiding the family toward shared understanding and productive decisions.

The result was a clear plan that honored the parents' intentions and gave the rising generation the confidence to carry it forward.



Constant attention, consistent vision.

Our approach is guided by principles that balance fiduciary responsibility with meaningful personal impact.

Our Approach

The most successful trustees understand that their role involves both prudent oversight of assets and nurturing the growth of beneficiaries as capable, confident individuals.

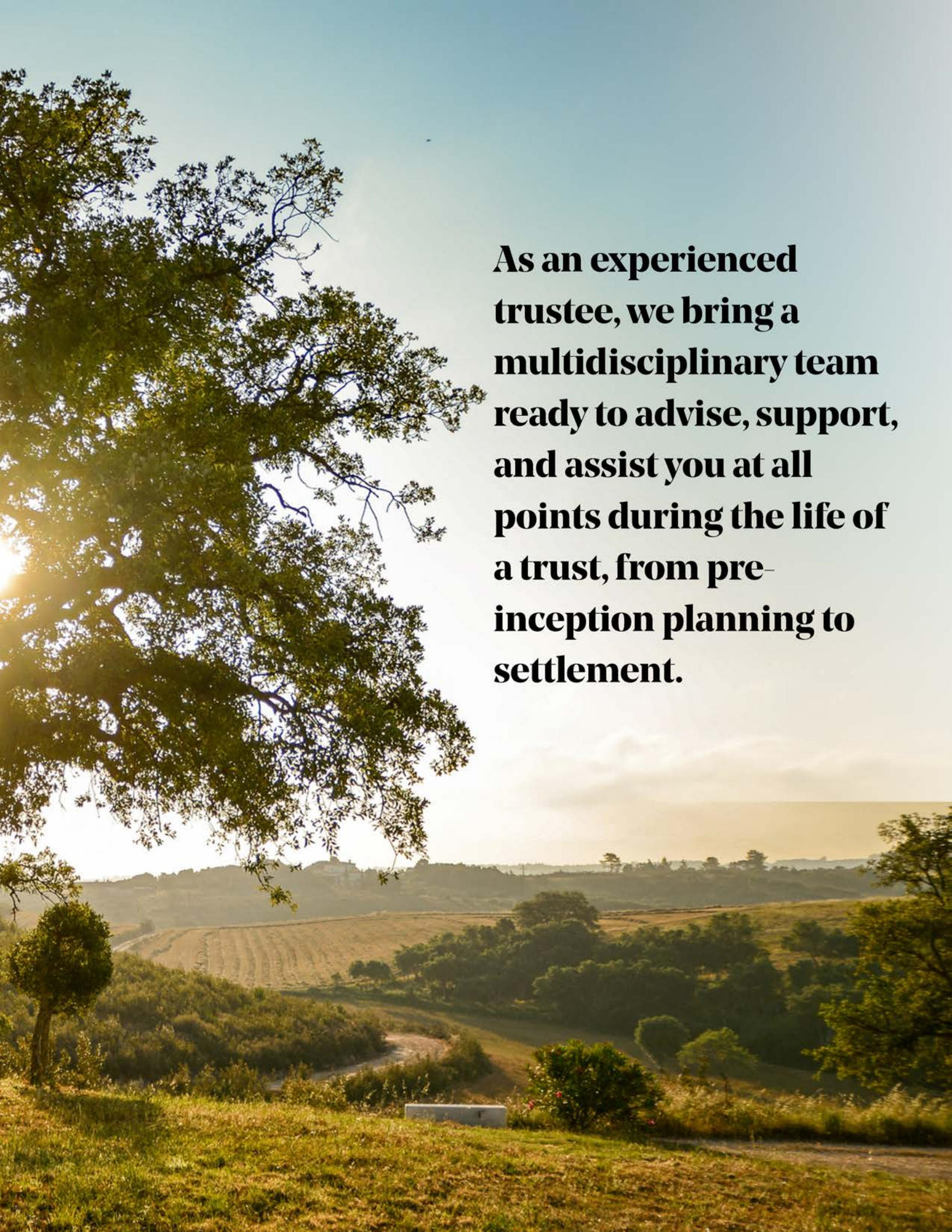
Provide strategic mentorship that empowers beneficiaries to develop their unique capabilities and strengths.

Cultivate authentic, trust-based relationships with beneficiaries built on mutual respect.

Create space for independent decision-making while offering guidance that enhances critical thinking and problem-solving skills.

Practice balanced accountability that acknowledges challenges while inspiring beneficiaries to recognize and pursue their full potential.

We bring a multidisciplinary team ready to advise, support, and assist you at all points during the life of a trust, from pre-inception planning to settlement.

A scenic landscape featuring rolling green hills under a clear blue sky. A large, leafy tree is positioned on the left side of the frame, with its branches extending towards the center. The foreground is a grassy field, and a small white rectangular object is visible on the ground. The overall atmosphere is peaceful and natural.

As an experienced trustee, we bring a multidisciplinary team ready to advise, support, and assist you at all points during the life of a trust, from pre-inception planning to settlement.



“Enterprise was founded on a singular guiding principle: unwavering duty to our clients. We demonstrate this commitment through exceptional service quality while maintaining the highest standards of fiduciary excellence.”

– Marc Rebboah, CEO & Founder



Family Solutions

Our Family Solutions practice brings a personalized approach to guiding clients through wealth complexities that extend beyond financial asset management.

We believe each family's journey with wealth is distinctive.

Our commitment is to meet you where you are, honoring your unique story and helping you navigate your path forward with confidence and purpose.

Wealth Communication

- Cultivating wealth conversations that matter
- Estate plan communication excellence

Next Generation Preparation

- DAF activation roadmap
- Multi-generational giving practices
- Impact with discretion

Strategic Philanthropy

- Family meeting excellence
- Relationship protection strategies

Family Governance

- Family meeting excellence
- Relationship protection strategies



Unique Assets

Enterprise Trust Company (ETC) has decades of experience managing complex, illiquid, and hard-to-value assets, integrating legal, financial, and fiduciary oversight to align each asset with the broader goals of the trust.

Stewardship Beyond Valuation

With key professionals, including legal counsel and CFA® charterholders on its team, Enterprise Trust takes a wrap-around approach to unique asset management – not only considering the productivity of the asset, but also how it fits into the life, goals and legacy of the grantors and beneficiaries. This approach includes, but is not limited to: board occupancy, interactive reporting, appraisals, income collection, operational monitoring, safe-keeping, etc.

- ▶ **Artwork**
- ▶ **Real Estate**
- ▶ **Insurance**
- ▶ **Coins/Currency**
- ▶ **Closely-held Businesses**
- ▶ **Alternative Investments**
- ▶ **Tangible Personal Property**



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