



OZK Trust & Wealth

Growing and protecting your legacy.

Our goal: Your continued success.

Managing the complexities of wealth is challenging. That's why it's important to have a trusted team who understands your unique financial goals and has the skill to help you obtain them. From managing trusts and administering estates to broad-based wealth management, Bank OZK can provide the counsel and solutions to help you continue building wealth while also preserving it for generations to come.



OZK TRUST

Protecting wealth is complicated. Protecting it for successive generations can be even more so. Navigating all the federal regulations, tax implications and various state laws requires a trust team made up of specialists from different disciplines. Our extensive knowledge and experience in administering trusts, including testamentary trusts, insurance trusts, special needs trusts and many more, provides a level of objectivity and expertise that can protect and preserve a lifetime of hard work.



OZK WEALTH

Managing your wealth successfully begins by understanding your complete financial picture. It requires experience and skill in the nuances of financial planning, but also something even more important – listening. To you. Your priorities, values and concerns. At Bank OZK, we take a holistic approach to ensure that we build a plan that is right for you even if your goals change. Through listening and the power of engagement, we can meet your goals and build a portfolio that reflects your priorities and values.

A steadfast commitment to excellence.

With extensive industry experience, the highly credentialed members of the OZK Trust & Wealth team come from many backgrounds, including family offices, law practices, wealth management firms and other financial institutions. We are a team of accomplished professionals with experience in complex account administration and the active management of high-quality portfolios. Working together, we are guided by what we call The OZK Way — a code of business practices and ethics that drives us to be the best bank for our clients and our community.

OZK TRUST

Each client's needs are unique. Our teams have the expertise to tailor custom trust solutions to meet individual goals.



SPECIAL NEEDS TRUSTS

Special needs trusts administered by Bank OZK allow individuals with a disability to preserve assets and improve their quality of life, without jeopardizing government benefits.



DIRECTED AND DELEGATED TRUSTS

A directed trust provides for investment powers to be exercised by a third party. In a delegated trust, the trustee delegates its investment power to a third party investment advisor hired by the trustee.



ESTATE PLANNING

Working together with your attorney and CPA, our professional team can help guide you through the process of mapping out an estate plan to meet your goals and honor your legacy.



CORPORATE TRUST SERVICES

We are a leader in providing trust services to a myriad of debt-issuing authorities, including municipalities, government agencies and corporations.



ESTATE SETTLEMENT

Bank OZK can assume the role of executor or personal representative and provide the expertise required to settle your estate efficiently, professionally and exactly as you intend.

OZK WEALTH

Markets require active engagement. Our wealth managers are committed to providing world-class investment advice and solutions.



INVESTMENTS

Our investment professionals provide independent, unbiased, practical advice and work with you to create a portfolio designed to meet your unique needs.



FINANCIAL AND RETIREMENT PLANNING

We guide you through the process of identifying your financial and life goals, provide sound advice about available options, and create a roadmap to help you achieve each objective.



CUSTODIAL BANK

Our custody services provide for physical possession of your financial assets, which includes holding your money and investments for convenience and security.



RETIREMENT PLANS

Bank OZK offers a wide array of retirement plans, including profit sharing, 401(k)s and defined benefit plans for companies of any size. We also manage individual retirement accounts.



REGISTERED STOCK TRANSFER AGENT

Bank OZK can handle all matters related to your securities, including transfer agent, registrar and dividend disbursement. We work to give you peace of mind and help maintain your positive relationship with shareholders.



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Monday-Friday 7am to 7pm CT
Saturday 7am to 4pm CT

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