Family Wealth Solutions

Country Club Trust COMPANY

Our Family Helping Yours

We deliver generational wealth guidance and financial planning strategies designed for your family and your unique goals. We draw on decades of experience serving families, addressing complex wealth management needs, and tailoring multidisciplinary advice with your priorities in mind.

Efficient, Local Decision Making

We are dedicated to building our hometown and are focused on Kansas City and the surrounding communities. This focus allows us to devote more time to learning about the unique challenges facing each of our client families. Our local decision-making results in timely, responsive client service experiences that strive to consistently exceed expectations.

Why Country Club Trust Company?

Family-Owned

- Multigeneration family leadership that understands the complex issues tied to family wealth
- Experienced and engaged advisors provide consistency

Dedicated Focus on Kansas City

- Locally committed, supporting the community where we work and live
- Driven to support the local businesses and families that shape the success of our hometown

Customized Wealth Solutions

- Specifically tailored solutions based on your family's unique goals
- A collaborative and committed approach to family wealth planning throughout your financial journey

Fiduciary Management

- Transparent advice putting you and your family's interests first
- Range of investment solutions aligned to your risk tolerance and specific goals

Comprehensive Financial Planning Solutions

- Custom Investment Portfolio Management
- Trust and Estate Services
- Charitable Giving and Philanthropic Planning
- Private Banking Services with High-touch Personalized Care
- External Advisor Coordination (Tax, Legal, Other)
- Family Business Services - Capital Raising, Succession Planning, Mergers and Acquisitions via CC Capital Advisors
- Generational Wealth Education and Legacy Planning
- Insurance Review and Guidance

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