Disclosures

Website Terms of Use

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Regulatory Disclosures

Colony Family Offices® is an SEC registered investment advisory firm. For a copy of our most recent ADV Part 2A, click here. For a copy of our most recent ADV Part 3 (Form CRS), click here. This website is for information purposes only and does not constitute a complete description of our investment services or performance.

Colony Trust Company® is a state chartered, public trust company regulated by the North Carolina Commissioner of Banks.

Important Information About Procedures for Opening a New Account

To help the government fight the funding of terrorism and money laundering activities, Federal law requires all financial institutions to obtain, verify, and record information that identifies each person who opens an account.

What this means for you: When you open an account, we will ask for your name, address, date of birth, and other information that will allow us to identify you. We may also ask to see your driver's license or other identifying documents.