

Eastern Point Trust Company Unveils Revolutionary AI-Powered Fiduciary Assistant in ChatGPT

Eastern Point Trust Company delivering Plain-Language Expertise on Complex Trust and Settlement Matters to Attorneys, Advisors, and Institutional Partners

WARRENTON, VA, UNITED STATES, November 10, 2025 /EINPresswire.com/ -- [Eastern Point Trust Company](#) (EPTC), a global leader in independent fiduciary services, proudly announces the launch of the [Eastern Point Trust Assistant](#)[™] - a groundbreaking and industry-first conversational AI tool powered by OpenAI's ChatGPT. This first-of-its-kind solution equips attorneys, financial advisors, trust officers, and institutional partners with real-time, plain-language information on intricate aspects of trust administration, Qualified Settlement Fund (QSF) compliance, regulatory procedures, settlement structures, and tax implications.



Scan QR code for direct access to the Eastern Point Trust Assistant

Founded in 2013, EPTC has administered over \$2 billion in settlement funds and trusts, serving more than 500 law firms and institutional clients across the United States. By harnessing cutting-edge generative AI technology, the Assistant not only accelerates decision-making but also enhances compliance confidence, reduces administrative burdens, and complements - never replaces - the deep, personalized expertise of EPTC's team of over 50 seasoned fiduciary professionals, including certified trust and fiduciary advisors (CTFAs) and licensed attorneys.

The Assistant is accessible 24/7 via the ChatGPT GPT Store, allowing users to pose nuanced queries such as: "What are the IRS reporting requirements for QSF distributions in multi-jurisdictional settlements?" or "How do I structure a special needs trust to maximize Medicaid

eligibility?" Responses are delivered in clear, actionable English, backed by citations to relevant statutes, case law, and Eastern Point's proprietary best practices - ensuring users receive reliable insights without compromising confidentiality or regulatory standards.

"At Eastern Point Trust, innovation has always been our north star, guiding us to blend human wisdom with technological prowess," said Joe Sharpe, President of EPTC. "The Eastern Point Trust Assistant™ democratizes access to our 20+ years of collective fiduciary expertise, empowering legal and financial professionals to navigate even the most labyrinthine settlement challenges with speed and precision. It's not just a tool—it's a trusted extension of our team, helping our partners deliver superior outcomes for plaintiffs and beneficiaries who rely on us."

This launch represents a pivotal advancement in modernizing access to fiduciary intelligence, aligning with EPTC's mission to foster transparency and efficiency in the \$10 billion+ U.S. settlement administration industry. Early beta testers, including prominent mass tort litigators and wealth management firms, have reported faster resolution times for compliance queries and heightened confidence in complex trust setups.

"Launching the Eastern Point Trust Assistant™ is more than a technological milestone - it's a commitment to evolving alongside our clients' needs in an increasingly regulated and fast-paced world," added Milan Kmezic Chief Operating Officer of EPTC. "We've seen firsthand how AI can transform rote tasks into strategic opportunities, allowing advisors to focus on high-value counsel rather than paperwork. This Assistant isn't replacing conversations; it's sparking better ones, reducing errors, and ultimately strengthening the fiduciary ecosystem we all depend on."

"While other QSF providers offer little more than a bank account, as a fiduciary leader, Eastern Point Trust continues to set the benchmark for ethical AI integration in trust services," noted Rachel McCrocklin, CTO. "Every response from the Assistant is rigorously vetted against our compliance framework, ensuring it upholds the highest standards of accuracy, impartiality, and data security. We're excited to see it evolve into an indispensable ally for professionals tackling everything from asbestos litigation funds to environmental settlement trusts."

Looking ahead, EPTC is committed to iterative enhancements, with a robust roadmap including:

- Guided case planning workflows: Step-by-step AI-assisted blueprints for QSF setup and trust funding.
- Interactive QSF benefit calculators: Customizable tools for projecting tax liabilities, distribution schedules, and long-term yield forecasts.
- Real-time compliance checklists: Dynamic, jurisdiction-specific audits with automated updates to reflect evolving IRS guidelines.
- AI-driven document analysis and red-flag detection: Upload and scan capabilities to identify inconsistencies in settlement agreements, trust instruments, or tax forms - flagging potential issues before they escalate.

Each new feature will uphold EPTC's founding principle: simplify complexity, ensure compliance,

and empower partners. The company plans quarterly updates based on user feedback, with beta access to premium features for select enterprise clients starting Q1 2026.

Experience the future of fiduciary support today.

Search “Eastern Point Trust” inside the ChatGPT GPT Store to start your conversation and unlock a free trial consultation with an Eastern Point expert.

About Eastern Point Trust Company

Eastern Point Trust Company is an internationally recognized independent fiduciary specializing in Qualified Settlement Funds (QSFs), special needs trusts, settlement management, and complex trust administration. With an unwavering commitment to transparency, compliance, and client success, Eastern Point Trust serves governments, law firms, plaintiffs, defendants, and institutional partners across the United States and the world. For more information, visit www.easternpointtrust.com

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