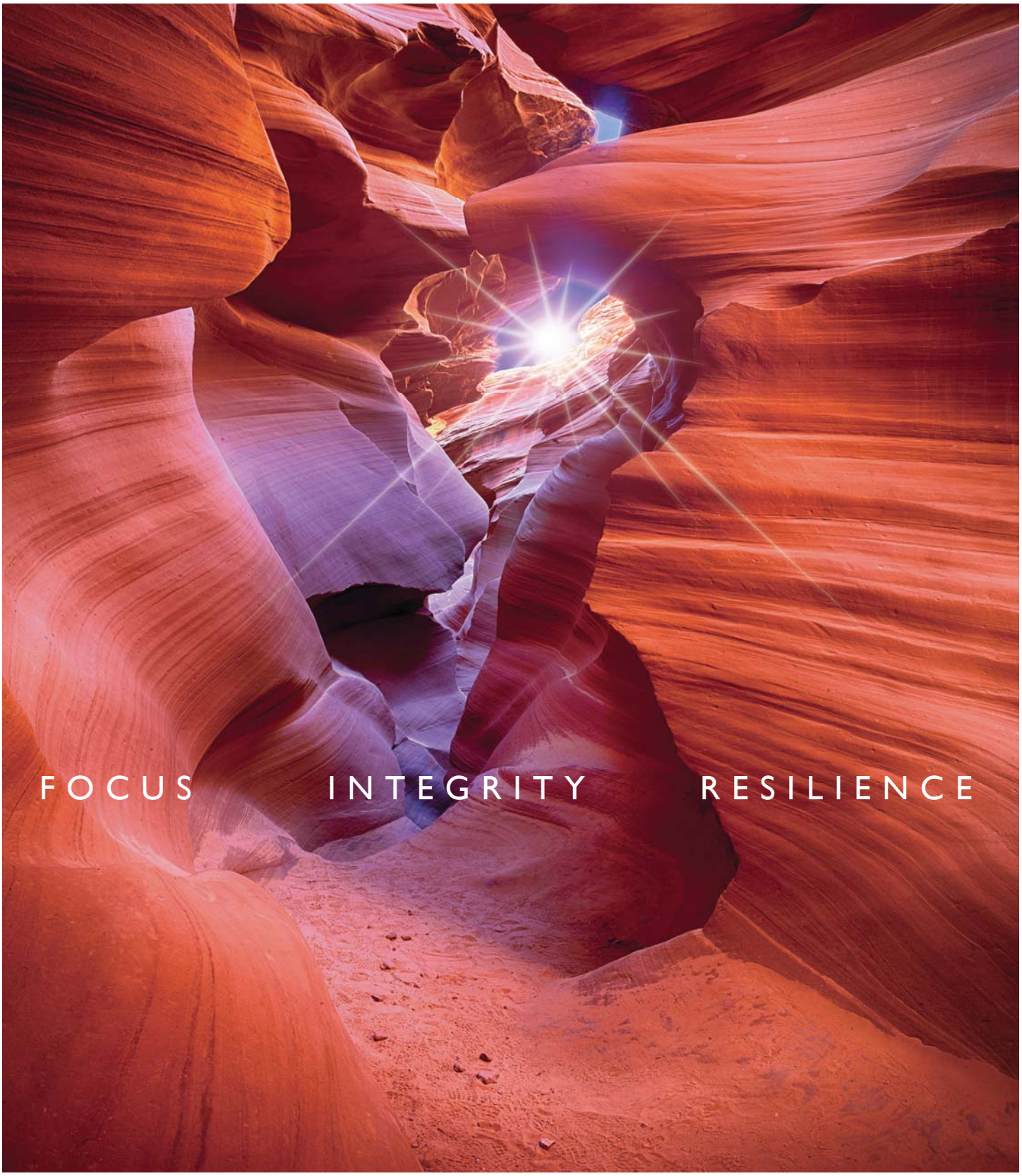
TrustBank™

Building Prosperity

Custom Solutions



www.tbaz.com

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About TrustBank

Competent

Trustbank is a well-capitalized, prudently-managed and financially strong wealth management organization that customers have entrusted with their money for over 105 years. Our team of advisors brings time-tested experience working with complex financial situations and a level of proficiency, knowledge and service that is unmatched. You deserve expertise, individual attention and a partner who understands both the challenges and opportunities that come with building and securing your wealth. With the TrustBank team of advisors beside you, you can have the peace of mind to help you build the prosperity you want.

Capable

TrustBank's team of advisors are skilled financial experts who will provide you with a comprehensive suite of financial services tailored to you, your life and your dreams. We have the knowledge and expertise to help you meet your cash flow needs today, optimize your assets for tomorrow, and minimize your risk without complicating your life. Whether you want to save for college, purchase a home, plan for retirement, manage your investments or create a succession plan for your business, we can help. Trustbank has a complete complement of personalized services, and we are there for you and your family every step of the way.

Consultative Approach

Our approach is consultative, not transactional, meaning we listen to what you want, when you want it and how important your different goals and objectives are to you. Our advisors take the time to thoroughly understand all of your financial needs so we can provide solutions to help you achieve your vision and goals for the future. We appreciate that your financial picture should meet multiple objectives, personal, and professional, familial and philanthropic. By focusing on what is important to you, we are able to generate comprehensive solutions as unique as you are.

Compassionate

We are humanizing the financial services industry, you will find that our advisors have the compassion and commitment to do what is best for you. Our compassion is shown through our actions, not just our words. We are driven by our core values of honesty and integrity - keeping your goals, values and aspirations as our priority. We take an active interest in your needs and build long-lasting individual relationships. Our advisors understand what is important to you - personal service, growth opportunities for your business, discretion, financial security for your family, and securing your financial legacy. Caring about people is not just a phrase to us; it is a serious commitment to you.

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Ways We Serve You

Total Life Planning

You're roadmap to prosperity starts with you. We are at the forefront of your financial journey by providing clarity on your family's goals and situation. Financial knowledge is powerful, we gather data and do ongoing analysis in order for you to make clear and concise decisions on financial and life situations. With TrustBank as your resource, you will have the services and attention you need to create a financial life well lived.

Investment Management

You are at the center of every step of the investing process. We strategically gather information in order to create a customized investment solution tailored to you. We look for greater returns while managing risk using a Core & Satellite approach and utilize thoughtfully integrated managers and investments in order to achieve specific objectives. We are connected to leading global resources, and even more connected to your specific goals.

Trust and Estate Wealth Management

Putting people first and building their lives is our number one priority at TrustBank. We help take care of families by assisting them in every aspect of their life. We provide an array of services to help ensure your trust is proactively administered for growth, protection, and preservation of wealth for future generations.

Legacy Planning

The strength of your personal or business legacy depends on choices you make along the way. For over a century TrustBank has worked with individuals, families, and business owners to ensure their wealth is transformed into a purposeful and lasting legacy. We understand the holistic picture by getting to know every aspect of you, to ensure you are invested appropriately, you have provided for your heirs and that your wealth is transferred in a fluid and tax-efficient manner.

Customized Lending Solutions

Tactical borrowing and thoughtful use of credit can help you increase the power of your wealth to achieve your goals. We offer a customized approach for all your lending needs. Whether buying your dream home or expanding your business, let us help you get there.

Personalized Wealth Banking

At TrustBank we deliver a personal approach to banking. We find the best financial recommendations to fit your needs. Whether you are needing personal or business banking solutions, we develop tailored banking strategies with advice customized to your individual circumstances while using cutting edge individual and business management solutions.

Philanthropic Services

Serving the community while serving people is at the core of what we do at TrustBank. We participate, work and give back to many different charities throughout the communities we serve. We are continuously inspired by the clients we serve, by their lives, their achievements, and their giving spirit. They inspire us to be dedicated at making a difference in order to better the world.

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Investment Management

With over 105 years of experience in the financial services industry. TrustBank has redefined the wealth management experience. We set the standard for client care and investment management, seeking to exceed your expectations so that we can protect your wealth and legacy for generations to come. Clients choose TrustBank for their investment dollars because we are:

Accessible

- Your account is managed by the leadership team of TrustBank, and you have direct access to our Investment Management insights.
- The teams responsible for your portfolio are engaged and own our responsibilities to you. We do not delegate them.
- Our team is structured to provide you with rapid responses. We are proactive so you remain informed and confident in all types of markets.
- Your account will be managed locally by our leadership team to ensure you receive our best, customized advice.

Objective

- We embrace a culture of objectivity and transparency. You will know what we do and why we do it.
- We take long-term views when evaluating portfolio allocations, but we make current-market adjustments to manage your portfolio toward your specific goal.
- We independently select high quality managers and investments, and thoughtfully integrate them to meet your objective.
- Our disciplined and objective team manages your portfolio to provide consistent results.

Connected

- We access best-in-class global resources and insights and then we overlay our own rigorous discipline to construct your portfolio.
- We build portfolios that are “client-driven.” Each investment in your portfolio plays a role in achieving your specific goals.
- We regularly evaluate your portfolio to assess if we are meeting your objective, as opposed to matching a market benchmark.
- We are connected to leading global resources, and even more connected to your specific goals.

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Total Life Trust Services

Our commitment to you only expands when your evolving life needs change. Together we will determine the services that will best suit you.

Ensuring Your Medical and Homecare Needs Are Met

As your situation evolves, we adapt our services to make sure your needs are being met. We will come to your home or skilled nursing facility, assist with transportation to doctors visits, and coordinate with your medical and care teams or health agencies. We know that you may need help with daily life and will help with shopping, errands, custodial care, or other non-medical needs.

Partner With Your Trusted Legal Advisors

We realize the importance of having a trusted legal counsel. If you don't have one already, we will happily refer you to an estate planning attorney that we work with. We will collaborate with your attorney as you prepare or update estate-planning documents and once complete, will assist in executing the documents. When needed, we can make your documents available to doctors, hospitals, and other institutions. We help you compile and keep a list of all assets including life insurance and other collectibles. We work together to reduce the chances of having your estate subject to probate and ensure an orderly distribution of your estate.

Accounting For The Money

We can step in and pay the bills, get tax returns prepared, reconcile your bank accounts and investment statements, and keep an archive of your bank statements. When the time comes, we will structure and pay out assets and income benefits, and help with real estate assets.

Overseeing The Assets

As a trustee, it is our duty to oversee the trust assets for the benefit of the beneficiaries. In order to satisfy your needs for today, long-term, and your beneficiaries, we develop a highly focused and personalized portfolio based on your wants and wishes. We will take into account and help you with social security, VA benefits, pensions, and retirement incomes.

Rehoming Your Pets

We know the love for a pet is unconditional. If you can no longer care for your pet, we will help find a new home for them per your wishes or with the assistance of local shelters.

Preparing For End Of Life

We can assist in helping you make pre-planned funeral or cremation arrangements in order to ease the burden on your family and give them the time they need to grieve.

We Are Your Support Team

As an impartial party, we will listen to and only recognize your wishes in your estate plan; other family members will not influence us. We will meet with your family members to provide updates as needed. As always, we are available any time you need us to answer questions or efficiently get you the information you or your family members need.

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Trust Services Tailored for Advisors

As a professional advisor, you work closely with your clients to develop a strong relationship and create a solid financial foundation through the management of their assets. We understand that there are times when clients will require additional services, such as an independent trustee.

TrustBank enhances your advisor/client relationship by providing objective trust solutions, while you deliver comprehensive investment management with the flexibility of holding client assets with your preferred custodian.

Advisor Friendly Trust Services

- Personal Trust Administration
- Specialty Asset Management and Administration (e.g. real estate, closely held businesses)
- Charitable and Philanthropic Trust Administration
- Individual Retirement Account (IRA) Trust Administration
- Estate Settlement and Administration
- Personal Representative Services

With today's diverse family dynamics, professional advisors need an experienced corporate trustee partner, and finding one both experienced and client-focused can prove daunting. TrustBank offers an ideal solution, while respecting your relationship with the client. With this service you will enjoy the confidence of knowing client affairs are conducted within the regulation and oversight of a chartered institution. Our trust administrative officers offer unmatched expertise and many years of providing personal service to clients similar to yours.

With TrustBank as your partner, you'll benefit from:

- **Experience:** Our trust professionals average over 20 years of corporate trust experience to provide the expertise needed to effectively serve you and your clients needs.
- **Stability:** TrustBank has built a reputation of strength and commitment, and with the uncertainty of the present economy, you can feel secure with an institution that has endured for over 105 years.
- **Personalized Services:** We are flexible in our approach while providing a focused, timely solution that meets the unique needs of you and your client.
- **Efficient Cost:** Our fee structure compares favorably with other trust companies and banks.
- **Impartiality:** As an independent third party corporate trustee, we are not motivated by family issues or the need to keep the peace; this enables us to serve effectively as a fiduciary.

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Types of Trusts

Because we understand the need for personalized trust services to meet each client's particular objectives, we administer a wide range of trusts, including:

- Living/Grantor Trust
- Survivor's Trust
- Marital Trust
- Decedent Trust
- Charitable Annuity Trust
- Charitable Unitrust
- Grantor Retained Annuity Trust (GRAT)
- Grantor Retained Income Trust (GRIT)
- Trust Under Will
- Special Needs Trust
- Bifurcated Trust
- Irrevocable Life Insurance Trust
- Conservatorship
- Personal Representative

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Meet The Team

Sandra Hudson
CEO Trust & Wealth Management
President TrustBank Arizona

Gregory Furseth
Chief Fiduciary Officer
Senior Vice President

Philip Hotchkiss
Chief Wealth Strategist
Vice President

Lisa Sullivan
Chief Trust Operations Officer
Senior Trust Officer

Jay Nova
Senior Portfolio Manager
Vice President

Gregg Balderrama
Senior Portfolio Manager
Vice President

John Chichester, Jr.
Senior Wealth Strategist
Vice President

Jena Lugo
Trust Officer

Jennifer Higgins
Senior Relationship Manager
Vice President

Aaron Mascarella
Senior Relationship Manager
Vice President

Annette Lawson
Senior Trust Associate

Jenny Bovee
Trust Associate

Stephanie Bawolek
Wealth Strategist
Senior Associate

Virginia Asher
Senior Financial Planner

Kaoife Lalor-Fraser
Senior Commercial
Lending Associate

Michael Rodenbush
Commercial Lending Associate

Angela Chavira
Arizona Banking Manager

Carter Barrett
Investment Executive
Personal Banker

Dillon Clark-Oden
Investment Executive
Personal Banker

Marie Fotino
Community Advocate Officer

Jeffrey Wallace
Loan Administrative Associate

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