



Aligned Partners

TRUST COMPANY

FINANCIAL AGENT UNDER POA

Aligned Partners Trust Company serves in the role of Financial Agent under a Power of Attorney for individuals who are no longer able to make financial decisions on their own behalf or would like assistance in managing their affairs. As Financial Agent, Aligned Partners prudently manages and invests the individual's assets, or works with the individual's investment advisor*, and makes distributions and disbursements on behalf of the individual to meet his or her needs. The duties and services that Aligned Partners provides as Financial Agent include the following:

- ✧ Manage and Invest Assets, including Real Estate
- ✧ Recordkeeping and Accounting
- ✧ Process Distributions
- ✧ Bill Payment
- ✧ Prepare Tax Returns
- ✧ Planning and Advice

Asset Range	Annual Fee**
Up to \$1,500,000	1.00%
\$1,500,001 to \$3,000,000	0.75%
Over \$3,000,001	0.50%

* Certain custodians are preferred in order to interface with our financial platform. Please refer to the service sheet titled Trustee with Independent Investment Advisor for fees.

** Fees include custody, investment management, and tax preparation services. When unusual or extraordinary services are requested or required, reasonable additional fees may be charged.