



Aligned Partners

TRUST COMPANY



John P. Shaffer

A MESSAGE FROM THE PRESIDENT OF ALIGNED PARTNERS TRUST COMPANY

Aligned Partners Trust Company is an independent entity, which combines and leverages products and services of top-level financial institutions to create its own brand of trust services in a cost-effective manner. Aligned Partners does not accept or retain financial incentives for using particular products or services thereby allowing it to objectively select the best available strategy for each of its clients.

WHY SHOULD YOU CONSIDER ALIGNED PARTNERS?

- **Aligned Services Providers:**

Fidelity Investment—Custodian & Brokerage
Bank of New York Mellon—Custodian & Brokerage
Charles Schwab & Co., Inc.—Custodian & Brokerage
FIS Charlotte—Trust Accounting System
Investment Scorecard Inc.--AIMR-PPS™ Performance Reporting
THOMSON REUTERS ONESOURCE TRUST TAX—tax system

- Diversified, long-term, low-cost, tax-efficient investment strategy.
- No proprietary mutual funds or other investment products. No sales commissions on investments; fees are strictly a percentage of the fair market value of assets.
- Flexibility in the combination of services provided; tailored services for individual trustees. Provider of services for small trusts, minimum fee of \$2,500 for full-service trust account and lower fees for small trusts in the accumulation phase.
- On-line access to account information for client and/or advisor if desired.

VISIT OUR WEB SITE AT {www.alignedpartners.com}

Please feel free to contact me directly for further information at (412) 258-3590, Extension 105 or e-mail me at jshaffer@alignedpartners.com.

John P. Shaffer, President