



Aligned Partners

TRUST COMPANY

TRUSTEE WITH INDEPENDENT INVESTMENT ADVISOR

Aligned Partners Trust Company is able to serve in the fiduciary role of Corporate Trustee along with an independent Investment Advisor in certain situations*. In this model, Aligned Partners continues to provide all of the Trustee duties and responsibilities except for investing the trust assets. This arrangement allows families the option to continue utilizing the services of a familiar Investment Advisor. In this relationship, Aligned Partners would provide the following services as Trustee:

- ✧ Administer the trust according to its terms
- ✧ Recordkeeping and Accounting
- ✧ Quarterly Statements
- ✧ Process Distributions
- ✧ Bill Payment
- ✧ Prepare Tax Returns

Asset Range	Annual Fee**
Up to \$1,500,000	0.500%
\$1,500,001 to \$3,000,000	0.375%
Over \$3,000,001	0.250%

* Certain custodians are preferred in order to interface with financial platform.

** When unusual or extraordinary services are requested or required, reasonable additional fees may be charged.