SEQUOIA
FINANCIAL GROUP

Family Wealth Trustee Support Services

Clarity. Confidence. Control.

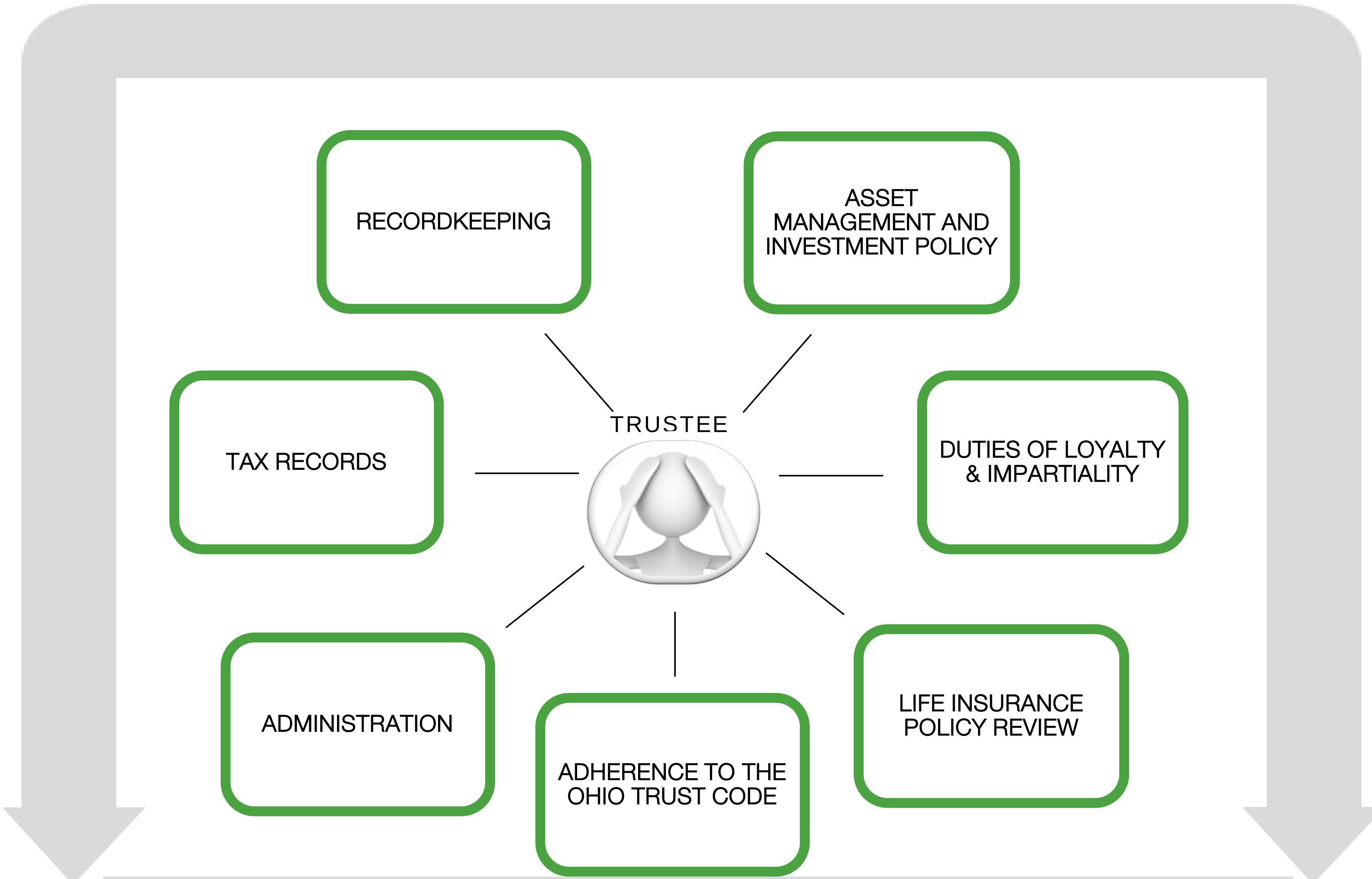
3500 Embassy Parkway | Akron, Ohio 44333 | 330.375.9480 | www.sequoia-financial.com

Trustee Support Services

Professional advisors, family members, friends, and family or private trust companies, among others, often serve as trustee of trusts. Acceptance of this appointment means taking on fiduciary responsibility and numerous administrative and operational functions.

At Sequoia Financial Group, our Trustee Support Services are designed with the trust creator in mind. Our goal is to instill confidence that a trustee will receive the expertise and support necessary to successfully perform their required duties in a manner consistent with the spirit of the trust while serving all trust stakeholders effectively and efficiently.

The Problem



To support you in these endeavors, we are pleased to present the following suite of services prepared exclusively for Trustees.

The Solution

Sequoia Trustee Support Services

Fiduciary Consulting
- Trust Summary
- Flowcharts
- Fiduciary and Administrative Guidance

Trust Accounting & Tax Compliance*
- Recordkeeping
- Income and Principal Separation
- Tax Worksheets and Form 1041 Preparation

Investment Management & Advice
- Investment Policy Statements
- Investment Management
- Aggregate Portfolio Reporting

Operational Execution
- Automated Trust Distributions/ Transfers
- Portfolio Trading
- Satisfying Ohio Trust Code Requirements

Beneficiary Wealth Planning
- Beneficiary Needs Assessment
- Beneficiary Financial Planning
- Financial Education

Sequoia Trust Reporting System – an integrated trust accounting and trading platform

* Accounting and Compliance components are prepared by a third party

Pricing

Complete Trustee Support Services Package

- No set-up fee (trust summary and flow chart included)
- Annual operational fee based on Assets Under Management (AUM)

Portfolio Size	Annual Fee
First $2,000,000	1.00%
Next $3,000,000	0.75%
Next $10,000,000	0.50%
Next $10,000,000	0.40%
Next $25,000,000	0.25%
Over $50,000,001+	0.15%

Additional Information:

- Non-managed assets reported through custodian at no charge
- Fixed fee pricing will also be considered

Trustee Support Services Team

Don Laubacher, CFP®, CPA, AEP®
Senior Vice President, Family Wealth
dlaubacher@sequoia-financial.com
330.255.2130 (direct)

Trevor Chuna, CFP®, AEP®
Vice President, Wealth Planning & Operations
tchuna@sequoia-financial.com
330.255.2121 (direct)

Laura Springer, CFP® CRPC®
Senior Manager, Private Client Services
lspringer@sequoia-financial.com
216.255.2138 (direct)

Kevin McPeek
Senior Manager, Family Wealth
kmcpeek@sequoia-financial.com
330.255.2139 (direct)

Disclosures

Sequoia Financial Advisors, LLC Form ADV Part 2A & 2B can be obtained by written request directly to: Sequoia Financial Advisors, LLC, 3500 Embassy Pkwy, Akron, OH 44333 or online at https://adviserinfo.sec.gov. This is for informational purposes only and has been derived from sources believed to be reliable, but is not guaranteed as to accuracy and does not purport to be a complete analysis of the material discussed, nor does it constitute an offer or a solicitation of an offer to buy any securities, products or services mentioned. Information shown is as of the date indicated and is subject to change at any time and without notice. Specific recommendations can only be provided as part of a formal analysis that is comprehensive in nature and addresses your personal and business financial information and respective goals and objective. Any action taken based on information in this publication should be taken only after a detailed review of the specific facts and circumstances. This information does not constitute tax, legal, investment or any other type of professional advice. You should consult with a qualified tax, legal or financial representative prior to making a decision.

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