

MEMBERS[®] *Trust Company*

Trust & Investment Services
for Credit Union Members



TRUST AND INVESTMENT SERVICES

- Investment Management
- Estate and Financial Planning
- Retirement Planning
- Corporate Trustee
- Living Trust Management
- Agent for Trustee
- Asset Protection Trusts
- Estate Settlement
- Custodian
- Reverse Mortgage Referral Program

TRUST SERVICE OFFICE

Suncoast Schools FCU
950 West Fletcher Avenue
Tampa, FL 33612
813-246-5211 • 866-300-9382

WHO WE ARE

Since 1987, MEMBERS Trust Company has met the special needs of members by providing trust and asset management services. In 2003, MEMBERS Trust Company converted to a Federal thrift chartered by the Office of Thrift Supervision, enabling it to offer services to members across the United States.

SERVICE PHILOSOPHY

What is in the best interest of the member and client is the central question and guiding principle that serves as the bedrock for decisions made by credit union management. Similarly, MEMBERS Trust Company, an organization owned by and for credit unions, adopts the same principal in the management of its operations and services. When you entrust us with assets to manage, you are more than just a customer, you become a valued member of our company.

YOUR LOCAL TRUST OFFICER

Jeanette L. Croley, J.D., C.P.A. serves as a Trust Officer of MEMBERS Trust Company and Suncoast Trust and Investment Services. Her financial services career has included providing tax consulting and compliance services to fiduciaries with a CPA firm, and serving as a trust officer with a large financial institution. Before becoming a trust officer, Jeanette practiced law in Tampa.

Jeanette graduated with honors from Florida State University with her accounting degree. She earned her law degree from the University of Florida, also with honors. Over the years, she has been active in several professional and community organizations in Tampa.



Jeanette L. Croley, J.D., C.P.A.

(see over)

OUR OWNERS

- Suncoast Schools FCU
- Cuna Mutual Insurance Group
- Credit Union
National Association
- Credit Unions & Affiliates

NATIONWIDE LOCATIONS

- California
- Florida
- Illinois
- Indiana
- Massachusetts
- Nevada
- New Mexico
- New York
- North Carolina
- Texas
- Utah
- Virginia
- Wyoming

TRUST & INVESTMENT SENIOR TEAM

Tom E. Walker has been President/CEO of MEMBERS Trust Company since its inception in 1987. He holds a B.S. in Business from Samford University, Birmingham, Alabama, an MBA from the University of Alabama and J.D. from the Birmingham School of Law. Mr. Walker is licensed to practice law in the state of Alabama.

Denise Giansante, V.P. Chief Fiduciary Officer, has over 20 years experience in trust administration and estate settlement. Prior to joining MEMBERS Trust Company, Denise served as Vice President and Relationship Manager with Fleet National Bank in Hartford, Connecticut. She graduated Magna Cum Laude from New Hampshire College, Hooksett, New Hampshire with an Accounting Degree.

John M. Largent, CFA, CFP®, CAP, with over 20 years experience in the investment management industry, joined MEMBERS Trust Company as the Senior Investment Officer in 2004. He graduated from the University of Arkansas, Sam M. Walton College of Business with an undergraduate degree in Finance and Banking in 1984 and received his MBA in 1985.

Neil P. Archibald, Corporate Counsel/Chief Compliance Officer, served as a Trust Officer for Merrill Lynch Trust Company FSB in Jacksonville, Florida, prior to joining MEMBERS Trust Company. Mr. Archibald earned his B.A. in English Literature from the University of Virginia and continued to obtain his J.D. from the University of Maryland School of Law. Mr. Archibald is a member of the Florida Bar.

Sheldon Reynolds, CFA, Vice President of Trust & Investments, graduated from Appalachian State University, Walker College of Business where he obtained his Bachelor of Science Degree in Business Administration. Mr. Reynolds has over 14 years of experience in wealth management.

INVESTMENT MANAGEMENT

John Largent, CFA, CFP®, CAP, leads our investment management team. This team includes an affiliation with MEMBERS Capital Advisors, a Registered Investment Advisor owned by CUNA Mutual Group, and manages over \$12 Billion. Our policy is to adopt a comprehensive portfolio process to coordinate the investment of all assets and achieve optimum asset allocation and diversification.

CORPORATE OFFICE

14025 Riveredge Drive • Suite 280

Tampa, FL 33637

(888) 727-9191

www.memberstrust.com

Non-deposit investment products available through MEMBERS Trust Company are not deposits of or guaranteed by the trust company, a credit union, or credit union affiliate, are not insured or guaranteed by the NCUA, FDIC or any other governmental agency, and are subject to investment risks, including possible loss of the principal amount invested. Trust services provided by MEMBERS Trust Company. *A Federal Thrift Chartered by the Office of Thrift Supervision*