

# Advantages of Using The Private Trust Company

Advantages of Choosing The Private Trust Company include:

- Experienced and knowledgeable trust officers with backgrounds in law, accounting, banking, investment management, tax and business
- Trust officers who are sophisticated professionals with objective family sensitivities
- Chartered as a National Bank devoted to trust services for families
- Regulated and examined by the Comptroller of the Currency, audited by independent auditors and bonded to protect your assets
- Able to provide trust services in all 50 states
- Designed to work with the Starr Financial Group as a team player, which provides timely and accurate statements to you, and your other advisors
- Develops a written investment policy statement to provide clear understanding of your goals, objectives and guidelines for the trust
- Reviews accounts annually and revises investment policies as appropriate to reflect changes to the portfolio, client circumstances and markets
- Wholly owned by LPL Financial
- Serving the independent financial advisor since 1968
- Over 5,200 affiliated financial representatives
- Over 3,200 Branch offices
- Over \$64 billion invested and managed annually
- Over \$21 billion in fee-based asset management