FIRM SUMMARY

COMPANY OVERVIEW
Founded in 1994 | Over $6.7 billion client assets under management | No affiliation with outside organizations | One of the largest independent trust companies in the Southeast | Offices in Atlanta, Greensboro, Memphis, and Nashville

SAFETY & SOUNDNESS
Regulated Trust Company | All client assets held at independent third party custodians | Independent audits by KPMG | Fiduciary insurance coverage

SELECT CLIENTELE
Individual and Multi-Generational Families | Foundations and Endowments | Family-Owned Businesses | Single Family Offices | Retirement Plans

EMPLOYEE OWNED
Our firm is 100% owned by a broad group of employees, creating a long-term incentive to partner with our clients

PERSONAL RELATIONSHIPS
Our hallmark is the personal relationship that we develop with our clients as well as the collaborative approach we take in working with their other advisors. We are focused on providing high-touch, best in class service to every client.

TAILORED SERVICES
We deliver an integrated and comprehensive approach to wealth investment management. We tailor specific strategies to meet the unique goals of our clients through our holistic approach and proven investment process.

THOUGHT LEADERSHIP
Our team brings together decades of direct professional experience in investment, fiduciary, tax, and planning disciplines to provide our clients with insight and guidance in all areas of Wealth Strategies.

CONFLICT-FREE
As a Trust Company, we serve in a fiduciary capacity for our clients. Our recommendations are driven solely by what is in our client's best interest. Our compensation is driven by the advice we deliver, not by product sales.

DIVERSIFIED TRUST

Wealth Strategies for Individuals, Families and Institutions

Individuals and Families

It is about the big picture. As a Diversified Trust client, you benefit from an integrated and comprehensive array of wealth strategies and services to help you reach your financial goals. Application of these strategies is customized for your specific circumstances. Our commitment is to explore, recommend, and serve as vigilant advocates of these strategies as they are designed to accomplish your goals.

These strategies work together to create your own big picture:

- Investment advisory
- Estate planning
- Philanthropic planning
- Business advisory
- Bill payment and recordkeeping
- Insurance coordination
- Financial planning
- Trust administration
- Tax planning
- Retirement plan investment advisory
- Consolidated investment reporting
- Family meeting facilitation / coordination

Institutions

Our institutional clients include both public and private foundations, endowments, and retirement plans. A significant portion of the careers of our professionals has been devoted to managing and overseeing large pools of institutional assets. We provide the advantage of our extensive direct experience with universities, independent schools, and other not-for-profits.

We offer the following institutional advisory services:

- Investment policy
- Spending policy
- Investment management execution and oversight
- Reporting and communication
- Planned giving initiatives

As a Diversified Trust client, you benefit from an integrated and comprehensive array of strategies and services to help you reach your financial goals. Our commitment is to explore, recommend, and serve as vigilant advocates of these strategies. Contact us today at info@diversifiedtrust.com.

DIVERSIFIEDTRUST.COM

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