

ARDEN TRUST FACT SHEET

BOUTIQUE TRUST COMPANY WITH A BALANCE SHEET

STRENGTH AND STABILITY



\$8.9+ Billion

in Assets under Administration



\$400+ Million

of Special Assets (real estate, closely held business, oil & gas, etc.)



\$62+ Million

in Capital and Surplus



\$200+ Million

in Special Needs Trusts



448 Irrevocable Life Insurance Trusts



3,000 Relationships

ABOUT US



- Trust Company established in 1975
- May administer in all 50 states

Employees

95

Trust Officers

36

8

Office Locations



5

Sales Executives



20

years' average trust industry experience



42

advanced degrees and professional designations

WE OFFER

Trust Offerings

- Asset Protection Trust
- Credit Shelter Trust
- DE Directed Trust
- Dynasty Trust
- Charitable Trusts
- Irrevocable Trust
- Irrevocable Life Insurance Trust (ILIT)
- Revocable Trust
- Special Needs Trusts
- Total Return Trust

Special Services

- Agent for the Executor
- Agent for the Trustee
- Endowments
- Escrow Services
- Estate Settlement*
- Principal & Income Accounting
- Real Estate
- Special Assets

*Dependent on location

Custody with the Financial Advisor

The Financial Advisor will remain part of the relationship and act as the portfolio manager.

CONTACT OUR SALES TEAM

Chris Wooten

Senior Vice President, Sales Manager
 470.704.7052
 chris.wooten@ardentrust.com

Gregg Homan, JD

Senior Vice President, Sales Executive
 215.740.8223
 gregg.homan@ardentrust.com

Melissa Linares, MBA

Vice President, Sales Executive
 203.887.3845
 melissa.linares@ardentrust.com

John Rothchild, JD, MBA

Vice President, Sales Executive
 651.587.6898
 john.rothchild@ardentrust.com

Pio Park

Assistant Vice President, Sales Associate
 910.382.7484
 pio.park@ardentrust.com