

SABAL TRUST COMPANY SERVICES

As the largest employee-owned trust company in Florida, Sabal Trust Company has been providing trusted wealth advice to affluent individuals and families throughout the state for nearly 30 years. Sabal Trust's advisors provide customized investment management, trust, IRA and estate-settlement services for individuals, corporations and nonprofits.

INVESTMENT MANAGEMENT

Sabal Trust constructs individual portfolios that emphasize stable income and capital appreciation potential. Investments focus on high-quality companies with above average dividends that exhibit historical and future earnings growth.

TRUST SERVICES

As an appointed corporate trustee, Sabal Trust's dedicated management team recommends courses of action and makes prompt decisions on behalf of clients and their beneficiaries. From impartial and confidential execution of document provisions to providing financial expertise customized for each client, Sabal Trust handles all responsibilities with sensitivity.

IRA SERVICES

Sabal Trust provides customized services to help clients navigate the IRA maze – from addressing annual income needs and fitting retirement assets into an estate plan to handling rollover plans from a prior employer and more.

ESTATE SETTLEMENT

The complex and often time-consuming tasks involved in settling an estate require experienced counsel. Sabal Trust expertly handles the complex and detailed responsibilities associated with financial affairs of an estate.

FIDUCIARY SUPPORT

Sabal Trust provides customized trust, estate and investment management services through a professional support team and cost-effective, consistent back office support. Services include data processing, asset custody and investment support.

SABAL TRUST PORTFOLIO CONSTRUCTION IS BASED ON:

- ◆ Asset Allocation
- ◆ Diversification
- ◆ Style Discipline
- ◆ Sector Expertise
- ◆ Tax Efficiency
- ◆ Consistency
- ◆ Investments with Solid Fundamental Characteristics



HERE TODAY. HERE TOMORROW.

sabaltrust.com