

# A Corporate Overview

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

## COMMUNITY INVOLVEMENT

Since our founding, Sabal Trust has supported many local nonprofits and charities through sponsorships of major fundraising events and a significant commitment of resources and service. Because we are a local, employee-owned investment management and trust company, we believe that investing and partnering with the communities we serve solidifies our long-term relationships and commitments.

For more information, please visit [sabaltrust.com](http://sabaltrust.com)

## HISTORY

*Sabal Trust and predecessor companies trace its history to 1983.*

## OWNERSHIP

*Employee Owned*

## EXECUTIVE LEADERSHIP

*Ward J. Curtis, Jr., Chairman*

*Bryant N. Jones, CEO*

*Laurence R. Fasan*

*Susan S. Mittermayr*

*G. Lowe Morrison, CFA*

*Scott L. Pieper, CFA*

*Gerard J. Lachnicht, CFA*

*Elizabeth J. Knowles*

*Kari C. Mainelli, CPA*

*Lucas Devicente, CFP*

## MANAGEMENT

*\$2 billion in assets*

## OFFICES

### St. Petersburg

*101 Central Avenue  
St. Petersburg, Florida 33701  
727.824.8700  
Fax 727.822.3423  
Toll Free 866.447.2225*

### Sarasota

*1800 Second Street, Suite 103  
Sarasota, Florida 34236  
941.556.0760  
Fax 941.556.4869  
Toll Free 866.243.2540*

### Tampa

*Corporate Center II - International Plaza  
4211 W. Boy Scout Blvd., Suite 190  
Tampa, Florida 33607  
813.229.2180  
Fax 813.223.7646  
Toll Free 800.274.2180*

### The Villages

*1060 Lake Sumter Landing  
The Villages, Florida 32162  
352.751.2199  
Fax 352.750.5096  
Toll Free 866.751.2199*