

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

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

Over \$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
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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
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INVESTMENT MANAGEMENT | TRUST SERVICES | ESTATE SETTLEMENT

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