



# Sabal Trust Services

*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 over 30 years. Sabal Trust's advisors provide customized investment management, trust, IRA and estate-settlement services for individuals, corporations and nonprofits.*

## INVESTMENT MANAGEMENT

At Sabal Trust, we believe the best approach to managing assets involves a consistent focus on prudent growth, enhanced cash-flow generation and systemic risk management. Our decades of experience have demonstrated that a strict adherence to these principles adds value to portfolios over long market cycles. That's why our investment team constructs individual portfolios utilizing this proven approach. We ensure continued adherence to these principles through a disciplined process of monitoring and feedback.

## 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 guide clients through the IRA process—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 multifaceted 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.

Mutual Funds and Other Securities are not FDIC Insured, may lose value and are not bank guaranteed.



INVESTMENT MANAGEMENT | TRUST SERVICES | ESTATE SETTLEMENT

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