

## Investments ... Simplified

Investing doesn't have to be complex. At Tri-Star Trust Bank, we listen to you and learn your investment goals. Then we help you craft a plan that works toward providing the tangible results that matter to you. Our experienced team collaborates closely with you, and with our trusted research partners, money managers and service providers, to develop your portfolio with the care and expertise you deserve.

### What You Can Expect from Our Investment Services

- A collaborative experience from the start – our investment team takes the time to learn your unique objectives and proceeds on a mutually agreed upon path.
- Input from our strategic partners – as part of Callan & Associates' Independent Advisor Group™, we have access to some of the brightest minds in economics and finance, and many of the same tools and resources Callan uses to advise on nearly \$2 trillion in total assets.
- A fully customized portfolio, with an emphasis on appropriate asset allocation, diversification and protection of your principal.
- Ongoing monitoring and management – Tri-Star's Investment Team is continually evaluating our strategies, managers, allocations and decisions to be certain portfolios are delivering the expected results. Portfolios are touched dozens of times annually through weekly, monthly and annual portfolio manager, client service team, and investment committee reviews.

### A Richer Future, Just a Phone Call Away

Let us take the complexity out of your investments with a plan that's focused on your unique objectives. Give us a call, or visit [www.tristartrust.com](http://www.tristartrust.com) for more information.

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