

Seeing the Big Picture

At Tri-Star Trust Bank, financial planning is a process, not a product, working toward enriching your life and reaching your goals. Our team of experienced professionals is ready to listen to you, learn your unique circumstances, and provide expert, objective financial planning that helps you achieve what you want out of life – now and for the future.

What You Can Expect from Our Financial Planning:

- A thorough review of your financial picture, including assets, income, taxes, expenses and financial trends.
- A planning process guided by your distinct goals related to investments, retirement, your estate and other areas.
- A realistic look at scenarios for your financial future, developed both by our knowledgeable staff and through software that can play out numerous “what if” situations.
- An unbiased, well-defined financial strategy that is simple to understand, but manages the complexities of investment, taxes and regulations.
- Continued support and plan adjustment as life unfolds and circumstances change.

A Richer Future, Just a Phone Call Away

Let us take the worry out of your financial future with a comprehensive plan that is as unique as you are. Give us a call, or visit www.tristartrust.com for more information.

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Frankenmuth: 989.652.6600

Greater Lansing: 517.827.0045

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