



## Suncoast Trust and Investment Services

*Is Pleased To Share Over a 30 Year Service Alliance with Members Trust Company, a Wealth Management Firm Originally Founded by Suncoast Credit Union.*



### **Carolyn D. Bare, Wealth Management Officer**

Carolyn works with individuals and families looking for guidance on managing wealth, passing wealth, or protecting wealth for future generations. She specializes in the areas of investment management, trust and fiduciary services, special needs, wealth protection and transfer, elder services, guardianships, estate settlement, and administration.

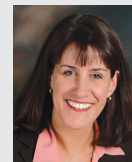


Suncoast Credit Union initially chartered the trust company in 1987, and now share ownership with over 50 credit unions across the United States. Members Trust Company, guided by the same mission and values as Suncoast Credit Union, offers professional trust and investment services in your best interest.

### *Your Investment Team*



**Sheldon Reynolds, CFA**  
*Vice President Trust & Investments*



**Kate Braddock, CFA**  
*Vice President, Co-Chief Investment Officer*



**Jason Ritzenthaler, CFA, CTFA**  
*Co-Chief Investment Officer*



**John M. Largent, CFA, CFP®, CAP®, CCE**  
*Chief Investment Strategist*

*It is pleasure to share with you the credentials and experience of the Investment Committee of Members Trust Company. They manage over \$2.5 billion for members just like yourself across the United States.*



For more information contact Carolyn Bare at 866.300.9382 ext. 86757 or via email at [Carolyn.Bare@SuncoastCreditUnion.com](mailto:Carolyn.Bare@SuncoastCreditUnion.com).

# Creating a **REVOCABLE LIVING TRUST**

*A Legacy of Care and Love For Your Family*



- > *Reduce the Probate Burden and Expenses for Your Family*
- > *Make Your Wishes Known to Avoid a Legal Guardianship*
- > *Maintain Privacy with Your Estate Settlement*
- > *Retain Control Over Your Personal Assets*

## *Your Revocable Living Trust Team*



**Neil Archibald, J.D.**  
General Counsel/  
Chief Fiduciary Officer



**Tamara Kidd, J.D.**  
Vice President &  
Senior Trust Officer



**Anne Baldy, J.D.**  
Trust Administration  
Officer



**David Carlson, J.D.**  
Vice President &  
Senior Trust Officer

Suncoast Trust & Investment Services is a marketing name used by Suncoast Credit Union. Securities sold, advisory services offered through CUNA Brokerage Services, Inc. (CBSI), member FINRA/SIPC, a registered broker/dealer and investment advisor. Trust services offered through MEMBERS Trust Company, Office of the Comptroller of the Currency. CBSI is a registered broker/dealer in all fifty states of the United States of America. CBSI and MTC are under contract with financial institution to make their services available. Not NCUA Insured, No Financial Institution Guarantee, May Lose Value. Not a Deposit of Any Financial Institution.

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