

POOLED
**SUPPORT
TRUST**



Secured Futures
A SECURED ALLIANCE AFFILIATE



POOLED SUPPORT TRUST WEALTH TRANSFERS

When it comes to supporting a person's health, education, maintenance, and/or support a Support Trust makes it easy. Often used as an estate-planning tool, this Trust helps pass wealth from one generation to the next. This flexible Trust option addresses long-term support for individuals, while protecting funds from wasteful spending. Grantors will have peace of mind knowing the funds will be professionally managed and overseen, keeping the family unified from one generation to the next.

CORPORATE TRUSTEE

Stewarding wealth means putting into practice core values which will sustain individuals as well as their fortune. A Pooled Support Trust with Secured Futures means professional management and oversight of funds. This ensures the grantor's wishes are fulfilled.

BENEFICIARY SERVICES

Whatever you need, we are here for you. We are waiting for your call with open arms and open ears — because at Secured Futures, you are part of our family. Beneficiaries and their family members can count on us to be there to advise, coach, and support them when needed.

UTILIZING FUNDS

We make it easy to access funds. From small to medium payouts, for bills and shopping, to large payouts, for cars and houses, beneficiaries have the option to either use their True Link VISA card for purchases on the go or submit requests as they come up.



HIGHLIGHTS:

- Flexible long-term support.
- For the sole benefit of an adult or minor.
- Not intended to relieve a parent or guardian of his or her duty to support a minor beneficiary.
- Protects funds from unintended or wasteful use.
- Someone answers when you call, or we'll call you back.

TRUST ADMINISTRATION FEES

Trust Setup Fee:	One-time \$500
Administration Fee:	\$125 per account, per month (waived if FMV under \$10k, or over \$750k)
Fiduciary & Investment Fee:	Sliding 1.75% annually on FMV of account (Includes RIA, Management & Custody)
Termination Fee:	The higher of \$300 or 3% FMV (Assessed on death of beneficiary only)
Minimum Threshold:	None (We accept any size account)

Terms, Definitions & Conditions

“Trust Administration Fee” is a fee, for which beneficiaries receive unlimited distributions, unlimited calls & correspondence, and all processing and handling of beneficiary or interested stakeholder concerns. It also includes internal accounting and reporting, and full account maintenance. The Trust Administration Fee does not include 3rd-party vendor fees, legal fees, or accounting fees charged by 3rd parties.

“Fiduciary & Investment Fee” is an all-inclusive fee that includes Fiduciary Services, IPS monitoring, Registered Investment Advisor, Asset Custody, Money Management, and all account reconciliations at the investment level. This also includes all balancing, transactions, and wire & bank fees.

*Fiduciary Fee Breakdown

The following chart displays the fees and allocations to each entity. The total represents the tiered levels, where the actual (last column) shows how much the fee is when factoring in the assets held within previous tiers. (Example: If administering a \$1.5M trust, the actual Fiduciary Fee is 1.58% FMV, even though the assets between \$750k and \$1.5M are tiered in at 1.4%.)

FAIR MARKET VALUE	FIDUCIARY	OTHERS	TOTAL
FIRST \$750K	1.00%	0.75%	1.75%
\$750K - \$1.5M	0.75%	0.65%	1.40%
\$1.5M - \$3M	0.50%	0.55%	1.05%
\$3M - 5M	0.35%	0.35%	0.70%
ABOVE \$5M	0.25%	0.25%	0.50%