

Fee Schedule for Investment Management or Trustee Services

- *Investment Management*
- *Estate and Financial Planning*
 - *Retirement Planning*
 - *Corporate Trustee*
- *Living Trust Management*
 - *Agent for Trustee*
 - *Estate Settlement*
 - *Custodian*
 - *Reverse Mortgages*

Since 1987, MEMBERS Trust Company has met the special needs of members by providing trust and asset management services. Owned by credit unions like Superior FCU, MEMBERS Trust Company provides personal trust services to Credit Union members like you. Our owners - with combined assets totaling over \$60 billion - provide strength for our operations and underpin our mission as a company.

MEMBERS Trust Company provides financial advice to help members achieve comprehensive financial objectives. Whether the issue is developing a plan for a special needs child or implementing an investment plan for your retirement, the team of professionals at MEMBERS Trust Company will focus on your personal needs and strive to be your trusted advisor.

MEMBERS Trust Company may serve as corporate trustee for various types of trusts designed to meet your financial and professional goals. These trusts include:

- ◇ **Revocable Living Trusts**
- ◇ **Marital Trusts**
- ◇ **Charitable Trusts**
- ◇ **Credit Shelter Trusts**
- ◇ **Special Needs Trusts**

Whether serving as Investment Manager or as Trustee, MEMBERS Trust Company will establish a customized Investment Policy Statement to govern the management of investments and assets in your account.

Fees:	
1st \$1,000,000	1.10%
Next \$1,000,000	0.85%
Over \$2,000,000	0.65%
Minimum Fee	\$2,000

MEMBERS Trust Company may charge fees for extraordinary services including estate settlement services with a trust. During the estate settlement process, the fees for trustee services will be suspended.



1381 North Perry Street
Ottawa, OH 45875

Phone: (419) 523-3116 x 4841
www.SuperiorFCU.com

MEMBERS[®]
Trust Company