2023 Estate Planning & Fiduciary Law Program
Sponsor + Exhibitor Directory

Advocacy Trust

Silver Sponsor

Whether you are a family, an individual, an attorney, a CPA/financial planner, or an advisor, Advocacy Trust is ready to be your advocate. Our company is made up of professionals with decades of trust industry experience and is well known for the caring support provided to individuals who have dealt with adversity and financial challenges. And unlike most retail trust companies, our professionals have worked on thousands of complex trust cases impacting a host of client situations.

www.advocacytrust.com

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American Cancer Society

Silver Sponsor

We are a leading cancer-fighting organization with a vision to end cancer as we know it, for everyone. We are improving the lives of people with cancer and their families as the only organization combating cancer through advocacy, research, and patient support, to ensure that everyone has an opportunity to prevent, detect, treat, and survive cancer.

Every second of every day, the American Cancer Society is helping someone who's facing cancer. And your clients' contributions are a big part of helping us fulfill our vision to end cancer as we know it, for everyone. To help you in return, we created the National Professional Advisor Network (NPAN). Through NPAN we can provide you with reliable, easy-to-use tools and resources to help your clients make informed decisions regarding their estate plans.

Please stop by our table to find out how you can join the American Cancer Society's NPAN network.

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American Heart Association

Silver Sponsor

The American Heart Association (AHA) is the oldest and largest voluntary organization dedicated to fighting heart disease and stroke. Heart disease is the No. 1 killer worldwide, and stroke ranks second globally. Even when those *conditions do not result in death, they cause disability and diminish quality of life. We want to see a world free of cardiovascular diseases and stroke.*

The American Heart Association's mission is to build healthier lives, free of cardiovascular diseases and stroke.

The AHA Professional Advisor Network supports professional advisors with reliable, easy-to-use tools and resources to help clients make informed and empowered decisions regarding their financial and estate plans – especially those touched by heart diseases or stroke. Join the American Heart Association Professional Advisor Network online at www.heart.org/Network . Your clients' contributions help make that possible.

www.heart.org

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ARAG

Silver Sponsor

ARAG connects network attorneys with members on its legal insurance plan for everyday life matters. Members sign up for ARAG legal insurance as a benefit through their employer and pay an affordable monthly premium to access a network of attorneys. Attorneys on the ARAG Network can choose the cases they want to take, and are paid directly by ARAG for work done on behalf of members.

http://araglegal.com/attorneys

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Argent Trust Company

Silver Sponsor

Our mission at Argent is to protect, manage and grow your wealth. We take our mission very seriously.

As a leading independent wealth management firm, we deliver in-depth, personalized, unbiased service in a candid and common-sense manner. Our core service offering is professional trust management. Building from that core, Argent provides an array of related financial services, including:

- *Investment management*
- *Family office services*
- *Oil and gas (mineral) management*
- *Wealth planning (advice and counsel)*
- *Employee Stock Ownership Plans*
- *Retirement plan administration and consulting*
- *Funeral and cemetery trust services*
- *Foundation management*

•Timberland investment management

Today, in our 33 offices located across 12 southern states, Argent employs 290 professionals with responsibility for more than $35 Billion in client assets and 2 million mineral acres.

www.argentfinancial.com

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Bank of America Private Bank

Silver Sponsor

For more than 200 years as one of the largest corporate fiduciaries for individuals and families, Bank of America Private Bank has served generations of families, administering all types of estates and trusts, including revocable trusts, irrevocable and testamentary trusts, dynasty trusts, charitable trusts and private foundations. As a private bank, we offer personalized strategies to help families manage the complexities of wealth. From broad-based investment management, backed by our Chief Investment Office and the extensive resources of Bank of America, to managing customized trusts and administering complex estates, we have the experience and a suite of solutions to help meet our client's diverse needs and goals.

www.privatebank.bankofamerica.com

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Bank OZK

Silver Sponsor

Bank OZK is a regional bank providing innovative financial solutions delivered by expert bankers with a relentless pursuit of excellence. The Trust and Wealth Division of the Bank provides a variety of unique and tailored services and solutions for high net worth clients, including wealth management, fiduciary services and personal financial management. We pride ourselves on providing customized services to our clients and working collaboratively with their other advisors for a tailored experience. Bank OZK's Trust and Wealth Division accepts appointment in a number of arrangements that many other traditional banks do not, including directed and delegated trust arrangements, and special and supplemental needs trusts. Under our directed and delegated platform, we will work with both closely held and non-marketable assets, as well *as outside investment advisors, allowing clients to benefit from our robust administrative services while retaining their investment advisors for asset management and we look forward to the opportunity to work with our partners in this community and their clients.*

https://www.ozk.com/trust-wealth/

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Beacon Pointe Advisors

Silver Sponsor

Beacon Pointe Advisors is the largest female-led Registered Investment Advisory firm (RIA) in the nation working with institutions, defined contribution plans, individuals and families.

Our mission is to provide comprehensive, objective investment and financial guidance that is focused on asset preservation and enhancement through the implementation of sophisticated investment strategies. We look to further enhance our clients' lives and missions through the alignment of their wealth and what matters most.

In North Carolina, Beacon Pointe Advisors offers a full range of fiduciary and agency services through its association with First Hope Bank N.A.. First Hope Bank operates under a national bank charter, allowing trust management services in all 50 states. First Hope Bank

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Bernstein Global Wealth Management

Silver Sponsor

Bernstein Private Wealth Management advises ultrahigh- and high-net-worth clients and their legal and tax partners on planning for—and living with—the complexities that come with significant wealth. Bernstein is distinguished among major wealth managers by its expertise in navigating life's transitions through a holistic approach. A flexible process—paired with innovative research, sophisticated modeling, and cutting-edge investment solutions—also set

Bernstein apart. Headquartered in Nashville, Bernstein is a business unit of AllianceBernstein, which ranks among the largest investment managers in the world, with offices in major world markets across 26 countries and jurisdictions and almost $700 billion in assets under management.

www.bernstein.com

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Bessemer Trust

Gold Sponsor

Privately owned and independent, Bessemer Trust is a multifamily office that has served individuals and families of substantial wealth for more than 115 years. Through comprehensive investment management, wealth planning, and family office services, we help clients achieve peace of mind for generations. Bessemer oversees more than $200 billion in assets for 2,900 families, and we take pride in our continued private ownership, singular focus on wealth management, alignment of interests among clients, owners & employees, and culture of service.

www.bessemertrust.com

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Brown Advisory

Platinum Sponsor

Our Mission:

We founded Brown Advisory with a simple vision: to build a client-first investment firm. Today, our 800+ colleagues are privileged to serve an inspiring group of individuals, families, nonprofits, charities, institutions and financial intermediaries in 44 countries across 18 offices. For each, we work to deliver first-rate investment performance, thoughtful strategic advice and the highest level of service to help them get to wherever it is they want to go.

We are Investors.

We achieve compelling investment results through thoughtful investing, a dedication to rigorous, fundamental research to gain a deep understanding of the businesses, issuers and managers in which we invest our clients' capital. Thoughtful investing is also the belief *that teams—through diversity, collaboration and a willingness to challenge one another—best deliver the first-rate performance that we promise to each and every client.*

We Advise.

We built our firm around the idea that an investment program is most helpful when integrated with broader strategic advice the ability to help clients think through their goals in a holistic manner, bring their various advisors together, and engage in meaningful and cohesive planning discussions around investment, philanthropic, fiduciary, next gen, tax and estate considerations.

Strategic Advisors – accounting, financial planning, tax, trust and estate experts – help clients achieve their financial, estate and philanthropic objectives by developing programs and solutions that consider their subjective perspectives and their objective circumstances.

www.brownadvisory.com

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Brown Brothers Harriman
Platinum Sponsor

At Brown Brothers Harriman (BBH), our mission is to help families thrive. We work with clients to define and share their unique values, communicate their vision for how they want their wealth to impact their lives and create plans and invest capital to help them protect, grow and transition wealth to family or philanthropic causes over the long term. Our clients leverage our comprehensive solution set, including disciplined investing aimed at preserving and growing client capital, values-based wealth planning, trust services, philanthropic advisory, family engagement and communication, family office services, private client lending and corporate advisory and banking, to achieve their objectives. No matter their definition of success, we will take care of our clients, their families and their wealth as if it were our own and invest alongside them, which ensures that our interests are aligned. At BBH, we help our clients thrive over generations.

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Carolina Advocacy Group LLC
Silver Sponsor

Carolina Advocacy Group is a premier advocacy firm specializing in service to both seniors and the disabled. Our primary focus is in the areas of care management, attorneys in fact for durable power of attorney, healthcare agent for healthcare powers of attorney, and guardianships. Our RNs and financial advocates work closely with professionals to ease the burden brought on when clients are experiencing issues of health, disability and/or abuse and undue influence. Our goal is to help your client have a healthier and more fulfilling life while saving you and the client time and money. We focus on client issues outside your area so you don't have to!

https://carolinaadvocacygroup.com/

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Choreo
Exhibitor

Choreo is an independent registered investment advisor (RIA) firm that provides wealth management services to middle market business owners, executives and individuals. Passionate about improving the well-being of our clients, their families and their communities, we seamlessly bring together our experienced teams to provide tailored investment options and planning strategies that support our clients' diverse needs. Originally launched over 20 years ago as a subsidiary of one of the largest CPA and professional services firms in the country, we now operate out of 39 locations and serve over 4,000 families across the country.

www.choreoadvisors.com

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Colony Family Offices & Trust Company

Silver Sponsor

Colony Family Offices is a multi-family office with just over $2.39 billion in AUM and provides comprehensive wealth advisory services to a select group of client families across all regions of the country. The principals of Colony Family Offices formed Colony Trust Company in 2018 to provide fiduciary services to clients. Colony Trust Company serves in a fiduciary role for just over $1.7 billion* in AUA for trusts with situs in North Carolina and Tennessee and does not manage investments.*

Colony's mission is to provide financial peace of mind to families of significant wealth. Our team works closely with each client family and their other trusted advisors to develop an integrated financial strategy. Colony's objective is to develop long-term professional relationships with client families and serve them for generations to come.
** As of 1/31/2023*

https://colonyfamilyoffices.com/

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Commonwealth Community Trust

Silver Sponsor

Commonwealth Community Trust (CCT) is a 501(c)(3) nonprofit organization that serves as trust administer for affordable and efficient Third-Party and First-Party Pooled Special Needs Trusts (PSNT) for beneficiaries with special needs throughout the United States. CCT was founded in 1990 by parents of children with special needs and concerned members of the community.

Staff members are knowledgeable about the rules governing Supplemental Security Income (SSI) and Medicaid for clients receiving means-tested government benefits so as not to jeopardize these benefits.

The Client Services team is committed to serving each client with empathy, respect, and integrity. Our staff are experienced in their fields and possess advanced degrees in Social Work, Public Administration, and Education. The Director of Client Services is a licensed attorney with many years of experience assisting individuals and their families while in private practice as an Elder Law attorney. In addition, a Licensed Clinical Social Worker assists beneficiaries who are in crisis and in need of additional services.

If you represent a family who has a loved one with a disability and are concerned about maintaining their SSI and Medicaid, or if they are unable to manage their own assets, visit our website at www.trustCCT.org or call 804-740-

6930 to speak with one of our new client representatives

www.trustcct.org

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Cumberland Trust
Exhibitor

Founded in 2001, Cumberland Trust is an independent trust company experienced in guiding the wealth transfer process to help families protect their legacies. We provide proactive trust and estate administration, working in conjunction with our clients' teams of attorneys, investment advisors, planners, and accountants. With over 20 years in business, Cumberland Trust's client-first services and directed trust platform have attracted over $6 billion in assets under administration with ten offices serving families nationwide.

www.cumberlandtrust.com

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Diversified Trust Company
Silver Sponsor

Diversified Trust is a wealth management advisory firm invested in realizing our clients' visions. As one of the largest independent trust companies in the Southeast with over $8 billion of client assets under management, we serve individuals, families, foundations, and endowments. Our goal is simple -- helping our clients focus on what's important to them.

www.diversifiedtrust.com

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DOYLE, Auctioneers & Appraisers
Silver Sponsor

Doyle's North Carolina Regional Advisory Office, located in Charlotte and directed by Hilary H. Pitts, a G.I.A. Graduate Gemologist, regularly meets with collectors, families and fiduciaries throughout the South-East Region to discuss the appraisal of estates, collections or single items and their subsequent sale at our New York gallery. Supported by a team of specialists and auction professionals, Doyle's regional advisors are located coast to coast to facilitate the entire appraisal and auction process, making it convenient for you or your *client to achieve maximum results and take advantage of our access to the global market.*

https://doyle.com/locations/north-carolina

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Elliott Davis
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Fidelity Charitable
Exhibitor

Fidelity Charitable is a 501(c)(3) public charity. We help donors maximize their generosity through our donor-advised fund, called the Giving Account. Established in 1991, we are the nation's top grant maker, distributing $10.3 billion to charities in 2021.

The Giving Account streamlined the process of strategic giving for a broad range of donors, allowing them to contribute many types of assets and plan their giving more systematically.

fidelitycharitable.org

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Fine Art Group, The
Exhibitor

Founded over 20 years ago, The Fine Art Group holds an unrivaled track record within the art ecosystem. From building collections and acquiring art, to developing a custom selling strategy, as well as investment opportunities and art financing, we have the expertise and capacity to manage the largest and most valuable art, jewelry, and high value collectibles portfolios. Recently named by the Financial Times as one of the top 10 Art Advisory firms in the world, our clients benefit from our shared in-house intelligence of specialist teams, offering strategic guidance with a 360-degree scope of services. As an independent team of art advisors, The Fine Art Group is committed to supporting clients at every level of the collector market across our five core services: Advisory, Sales/Agency, Art Finance, Investment, and Appraisal.

https://www.fineartgroup.com/

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Firm Numbers

Exhibitor

Firm Numbers is a remote professional bookkeeping firm focused on giving small business owners and key decision-makers the information needed to make informed decisions about their business: to Be the Boss, not the Bookkeeper. Beginning in June 2018, Firm Numbers was originally founded to serve small law firms. We now have a Daily Money Manager division to help high net worth individuals who need to outsource financial and other administrative functions to serve clients in North and South Carolina.

Firm-Number.com

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FNB Wealth Management

Exhibitor

Founded in 1864, FNB is based in Pittsburgh, PA with $42 Billion in assets. FNB Wealth manages over $15 billion and offers local NC & SC based Trust Services and Investment Managment for individuals, families, foundations, & endowments.

https://www.fnb-online.com/

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FORVIS Private Client

Gold Sponsor

FORVIS Wealth Advisors, LLC is a SEC-registered investment advisor, and subsidiary of FORVIS, LLP, the 8th largest CPA & Advisory firm in the country. We operate under the brand FORVIS Private Client™. Our multidisciplinary team of advisors offers sophisticated financial and wealth management strategies to individuals, families, businesses, and more. We can help clients envision and pursue their financial and life goals. We are committed to independence, integrity, and objectivity and offer a unique blend of expertise that spans tax, personal wealth planning, and investment management solutions. Our professionals -

including CPAs, CERTIFIED FINANCIAL PLANNERS™, and Chartered Financial Analysts® - work together to offer flexibility for a client's changing needs, helping them grow, preserve, and protect their wealth.

www.forvis.com

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Franklin Street Trust

Gold Sponsor

Franklin Street Partners is a wealth management firm founded in 1990 with over $3 billion in assets under management located in Chapel Hill, North Carolina. Our goal is to work with clients as partners in their trust and investment management needs. Franklin Street Partners provides Trust services through Franklin Street Trust, a non-depository trust company chartered by the State of North Carolina and regulated by the North Carolina Office of the Commissioner of Banks. All trust relationships are managed to a fiduciary standard. Additionally, the firm employs a rigorous set of practices that define a prudent process for investment fiduciaries. Our approach is to provide independent, trusted and personalized advice, complementing in-house expertise with carefully selected external resources.

The trust powers and skilled professionals of Franklin Street Trust allow us to act as corporate trustee in implementing sophisticated estate planning, wealth transfer and charitable strategies that are seamlessly integrated into a broader investment program. Our trust officers are experienced at managing complex, multigenerational structures and combine technical expertise with a sensitivity to the unique dynamics of each family. Depending on the client's needs, Franklin Street Trust has the ability to serve as trustee, co-trustee, executor and managing agent of trust assets.

www.franklin-street.com

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GreerWalker

Gold Sponsor

GreerWalker LLP provides tax, accounting, and advisory services focused on the needs of privately-held middle-market companies and their owners throughout the US and around the globe.

Our affiliate GreerWalker Corporate Finance LLC offers exit planning and merger and acquisition services to provide a complete, *integrated solution for middle market companies and their owners.*

Customized wealth planning for every stage of life is offered through our strategic partner, Choreo, LLC. Choreo, LLC is an investment adviser registered with the U.S. Securities and Exchange Commission (SEC). Registration as an investment adviser does not imply a certain level of skill or training of the adviser or its representatives.

With over 135 associates, we are one of the ten largest CPA firms in our region and among the top 200 CPA firms in the United States. We have repeatedly been recognized as one of the nation's "Best of the Best" accounting firms by Inside Public Accounting based on our overall superior financial and operational performance.

greerwalker.com

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Hutchinson Family Offices

Silver Sponsor

Hutchinson Family Offices offers services including family office, business owner exit planning strategies, divorce consulting, private wealth strategies, private investment access, tax planning, family governance and philanthropy strategies for affluent individuals and families. The goal of our Family Office model is to offer the highest level of care and concierge service to wealthy families, providing them order, simplicity and financial confidence.

Exit Planning for Business Owners - Hutchinson Family Offices has 2 Certified Exit Planning Advisors (CEPA designation) on the team. Both Sherry Campbell, CFP, CEPA and Ashley Madden, CFP, CPA, CEPA, help business owners accelerate enterprise value in the company through tested methods and approaches, quarterback and collaborate with other expert members of the business owner team, and curate their own personal goal-based financial plans. This multi-prong, long-range strategy allows the owner to be confident and prepared for what adventure comes next after they exit their current company.

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InterActive Legal
Exhibitor

Estate Planning and Elder Law professionals turn to InterActive Legal as their main resource for the latest planning strategies. We provide the most comprehensive productivity system on the market with an easy-to-use document drafting system, extensive continuing education, thought-provoking discussion forums, and more.

www.interactivelegal.com

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Investors Trust
Silver Sponsor

Why should you choose Investors Trust? A recent survey found that 84% of US investors are interested in having a more personalized investment portfolio. With several options available to you, what sets us apart from the rest? Investors Trust embraces five themes that differentiate us from other companies and the services they offer: strong history and local heritage, disciplined investment process, outstanding investment management with quality strategies, holistic approach, and superior client service.

www.invtrust.com

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Lawyers Mutual Liability Insurance Company of NC
Silver Sponsor

In business since 1977, Lawyers Mutual has been providing continuous financial protection from professional liability to North Carolina lawyers longer than any other insurance company. Legal professional liability insurance is the only type of coverage we offer. As a result of doing one thing we do that one thing well.

The dedicated employees of Lawyers Mutual are always available to discuss your coverage or claims. We also provide free education and resources to help you better serve your clients and the public. Lawyers Mutual is proud to provide coverage to more than 8000 lawyers in North Carolina.

Trust. Value. Loyalty.

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Life Trust3D
Exhibitor

LifeTrust3D™ is the nation's premier life insurance monitoring, management, and consulting firm. What we do is very specific and laser-focused. We review, evaluate, manage, and monitor trust-owned life insurance policies. We exist to do three things: Maximize benefits, reduce risk, and support fiduciaries. For fiduciaries and trust officers managing Irrevocable Life Insurance Trusts, we become a primary resource and support system. Insurance plans were designed to deliver a future promise. With an ever-changing insurance landscape, increasing Cost of Insurance charges, Private Equity firms entering the marketplace, lower than anticipated dividend crediting rates, we remain focused on helping you deliver the life insurance proceeds anticipated by the families you serve. We support ILIT fiduciaries utilizing our 3D Process™—where we Discover. Design. Deliver. real solutions for your clients.

For a deeper dive into these services rendered, or for a consultation, connect through www.lifetrust3d.com.

www.lifetrust3d.com

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Marsh McLennan Agency, Private Client Services
Exhibitor

MMA Private Client Services is proud to provide personal insurance solutions for some of the world's leading families, family offices, and individuals who trust us to help them protect their assets, wealth, and lifestyles. We understand how to safeguard what you are most passionate about- homes, cars, art, yachts, and more- no matter how unique. Our global reach and resources allow us to find coverage when others can't. And in the event of a loss, we're on your side, helping to resolve the claim so you can go back to pursuing your dreams.

mmapcs.com

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Morehead Group
Platinum Sponsor

Since 1941, professionals with Morehead Group have provided strategic life insurance solutions to affluent individuals, families and closely held businesses. The firm collaborates with the client's team of planning professionals to design, implement and administer comprehensive life insurance plans. The firm's proprietary processes provide comprehensive plans, collaborative focus and confidence to our clients. Morehead Group is a member firm of Valmark Financial Group, a client-focused community of select life insurance professionals.

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NCBF
Exhibitor

The North Carolina Bar Foundation's mission is to unite the talent and generosity of our profession to be a power of greater good for the people of North Carolina. Our vision is for a vibrant North Carolina where legal services are available to all, regardless of ability to pay; where members of the legal profession provide community service and leadership that profoundly impacts the public, thereby demonstrating the value of our profession to society; and where all North Carolinians understand and have confidence in a legal system that serves them. We value access to justice, service, education, professionalism, diversity, equity, and inclusion.

https://ncbarfoundation.org/

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NCCCLA

Silver Sponsor

NCCCLA is attorneys assisting clients with highly efficient team-oriented approaches to dispute resolution since 2015. Approximately 50 trained collaborative attorneys across the state are ready to assist in any civil dispute, particularly focused on matters involving trusts and estates, family and closely-held businesses, employment and construction. Collaborative attorneys cannot represent clients in litigation. NCCCLA was behind the passage of the NC Collaborative Law Act in 2020. Our founder was recognized with the NCBA Dispute Resolution's Peace Award for 2022. We hope you will let us know where we can help those in dispute avoid lengthy and expensive litigation and preserve their relationships by working together to reach a win-win solution. Please visit our website for more information and for a member directory.

www.nccivilcollaborativelaw.org

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NCF Carolinas Inc.

Silver Sponsor

For more than 40 years, our team at the National Christian Foundation (NCF) has come alongside generous families and individuals, and their advisors, to help them to send more than $16 billion in giver-recommended grants to 71,000 churches, Christian ministries, and other charities.

Comprised of some of the brightest, most passionate experts in charitable giving today, our team at NCF helps people create a well-planned, intentional strategy for their giving so they can inspire their family, maximize resources, and leave a lasting legacy.

https://www.ncfgiving.com/carolinas/

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Old North State Trust

Silver Sponsor

Old North State Trust is a local, independent, family-owned business. We focus on growing wealth and preserving legacies by building and maintaining relationships with our clients and other professionals we partner with, such as attorneys and CPAs. We put our clients first by listening and providing creative solutions to meet their needs. We have five office locations throughout the state with knowledgeable and experienced professionals. We specialize in trust services, estate administration, retirement services, legacy planning, and asset management, and will work with unique assets including real property. Every client has a dedicated Trust Officer or Advisor who provides a personal and local touch that sets us apart from the larger institutions. Our employees are dedicated to our clients and to the communities we serve. Our mission at Old North State Trust is "Helping Families Create and Enrich their Legacy for Generations to Come".

www.oldnorthstatetrust.com

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PNC Private Bank

Gold Sponsor

PNC Private Bank has been helping high-net-worth individuals build and preserve their legacies for over 160 years. Today, our clients have access to the in-depth resources of PNC–one of the nation's largest diversified financial services organizations–delivering investment management, wealth planning, trust, estate and personal banking services. Whatever your current stage in life, PNC Private Bank will work with you, listening to your needs, thinking about your goals and comprehensive solutions for a lifetime of wealth management. At PNC, we understand the needs of business owners, senior executives, successful individuals and professionals, and we have the depth of resources to help address those needs with customized, practical solutions.

www.pnc.com

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Rockefeller Global Family Office

Platinum Sponsor

"We are a global family office that has served the Rockefeller family since 1882, and the story of the first family in family wealth is our blueprint." Timothy D. O'Hara, Co-President, Rockefeller Global Family Office

https://rcm.rockco.com/global-family-office/

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South Park Advisors, LLC

Silver Sponsor

South Park Advisors is an independent business valuation firm that caters to business owners, attorneys, commercial bankers, trust departments, insurance agents and wealth advisors. Our adaptive problem solving skills is what sets us apart - there is no "one-size-fits-all" approach when it comes to serving the needs of closely held businesses. That is why our focus starts and ends on what matters most, the client. Our experience is diverse and includes business valuations prepared in connection with estate & gift tax reporting, business succession planning, litigation support, dispute resolution, employee stock ownership plans (ESOPs), fairness opinions and charitable foundation reporting.

https://www.southparkval.com

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State Employees' Credit Union - Trust Services

Exhibitor

State Employees' Credit Union (SECU) is a not-for-profit financial cooperative owned by its members and has been providing the employees of the State of North Carolina and their families with consumer financial services for over 75 years. SECU through Members Trust Company offers corporate trustee and executor services to members. Since 1987, Members Trust Company has met the needs of credit union members by providing trust and asset management services. With offices throughout the United States, Members Trust Company is owned by credit unions like SECU and adopts the philosophy of its owners to serve members with an emphasis on quality service and low fees.

www.ncsecu.org

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Steen Valuation Group, LLC

Silver Sponsor

Ad Diem Tendo is the Steen family motto. AdDiem Tendo translates into Today I Arise. That is what we do every day, arise to meet and exceed client needs and expectations. Steen Valuation Group is passionate about client service and focused on providing valuations backed by experience and expertise, based on the latest valuation theory and supported by evidence. We are also committed to giving back to the community through board membership participation and charitable donations.

The Steen Valuation Group provides valuation services related to business equity, complex securities, and intangible assets with a focus on exit planning, ownership transitions, and accounting and tax compliance.

www.steenvaluationgroup.com

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TowneBank

Exhibitor

TowneBank is a community bank founded in 1999 with a focus on friendships and relationships. With offices in North Carolina and Virginia, Towne provides a wide array of financial services to individuals, businesses, and community organizations. With a focus on serving others and enriching lives, Towne is a leader in promoting the social, cultural, and economic growth of the local community. has total assets of $16.67 billion as of March 2022, and was recently named by Forbes as the 9th best bank in America.

www.townebank.com

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Tranzon Fox

Exhibitor

Tranzon is a nationwide cooperative partnership of real estate professionals dedicated to a better way of buying and selling real estate. Our mission is to assist executors, guardians, conservators, and other fiduciaries with property evaluations and strategies for selling real estate assets quickly and at fair market value.

We pride ourselves on excellent service, a thorough and transparent sales process, and high quality results. Our team has built an exceptional reputation for excellence and integrity over the past 20 years.

www.tranzon.com

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Truist Wealth

Gold Sponsor

Truist Financial Corporation is a purpose-driven financial services company committed to inspiring and building better lives and communities. Truist has leading market share in many high-growth markets in the country, and offers a wide range of services including retail, small business and commercial banking; asset management; capital markets; commercial real estate; corporate and institutional banking; insurance; mortgage; payments; specialized lending; and wealth management.

Headquartered in Charlotte, North Carolina, Truist is a top-10 U.S. commercial bank with total assets of $544 billion as of March 31, 2022. Truist Bank, Member FDIC. Learn more at Truist.com.

Truist Wealth delivers holistic wealth management solutions to affluent, high, and ultra-high net worth individuals, families, and business owners in the U.S. and abroad. Truist Wealth also provides public, private, and nonprofit organizations with corporate trust, escrow, and institutional investment management services. In addition, Sterling Capital Management, a registered investment advisor and wholly owned subsidiary of Truist, provides investment management services to a diverse group of clients.

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Trust Company of the South

Silver Sponsor

Trust Company of the South is a North Carolina independent trust company providing premier investment, wealth management, and fiduciary services for high-net-worth individuals, families and institutions. Our experienced professionals are owners of the firm, decision makers whose counsel is held to the fiduciary standard. As an *independent firm, our interests are 100% aligned with our client's.*

www.trustcompanyofthesouth.com

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U.S. Bank Private Wealth Management
Exhibitor

U.S. Bank Private Wealth Management serves successful individuals and families who have complex financial situations. We'll help them work towards their goals of creating, growing and protecting wealth. We'll partner with them on both traditional wealth management opportunities and other unique needs such as specialty assets, charitable and philanthropic desires and inherited family wealth.

usbank.com/privatewealth

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WealthCounsel
Silver Sponsor

State-of-the-art drafting software and workflow solutions, practice building coaching programs, legal content marketing services, education, and a nationwide community of like-minded attorneys—WealthCounsel has all you need to practice efficiently and confidently.

https://www.wealthcounsel.com/

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Wells Fargo Wealth and Investment Management

Gold Sponsor

Wells Fargo Private Bank provides high-net-worth clients with a complete range of wealth solutions that include wealth planning, private banking and lending, fiduciary services, and fiduciary investment management, as well as specialized wealth services. Our mission is to build enduring relationships on a foundation of sound, thoughtful, and objective advice.

www.wellsfargo.com

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Winston-Salem Foundation, The

Exhibitor

The Winston-Salem Foundation is a community foundation comprised of more than 1,650 charitable funds. Established in 1919, we are among the nation's oldest community foundations, and the first foundation of any type in NC. At the end of 2022, we managed nearly $650 million in assets and granted more than $76 million to charitable causes.

www.wsfoundation.org

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