

## GUARANTY BANK AND TRUST COMPANY TRUST SERVICES

**ACHIEVE YOUR GOALS  
WITH SOLUTIONS TAILORED FOR YOU**

Your Wealth Management Goal	Our Solution			
	Revocable Trust	Irrevocable Trust	Investment Mgt Account	Self Directed IRA
<b>Time Savings and Convenience</b>				
▪ Consolidation of all types of assets on one statement	X	X	X	X
▪ Single point of contact for multiple asset types	X	X	X	X
▪ On-line access to portfolio values and transactions	X	X	X	X
▪ Flexible income distribution plans	X	X	X	
▪ Response to class actions and tender offers	X	X	X	X
▪ Maintenance of tax cost records, including mutual fund and dividend reinvestments	X	X	X	
▪ Ability to select multiple brokers			Optional	X
<b>Maximum Earning Power</b>				
▪ Cash flow management	X	X	X	X
▪ Daily cash sweep of all cash into institutional money market	X	X	X	X
▪ Ongoing portfolio management	X	X	Optional	
▪ Monitoring and collection of maturing bonds and calls on pay date, same day reinvestment	X	X	X	
<b>Safety and Peace of Mind</b>				
▪ Disability Planning – continuity of cash management, even during illness	X			
▪ Bill paying	X		X	
▪ Medical Insurance claim processing	X		X	
▪ Impartiality when carrying out wishes of the decedent		X		
<b>Expense Savings</b>				
▪ Coordination with tax preparers	X	X	X	
▪ Simplification of asset transfer on death	X			