PROFESSIONAL FIDUCIARY SERVICES

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Answers to FAQ's

- What is a fiduciary? "A 'fiduciary' is someone who is trusted to manage property for someone else, the 'beneficiary'. A fiduciary is expected to act selflessly and with undivided loyalty to the beneficiary."[i]
- What is your organizational structure? Cherie Ware, President, and Amy Egtvet, CEO, are the Principals of WE Trust Company. Reporting to the Principals are the Director of Trusts and Estates, Director of Family Office and Director of Operations and a team of Associates.
- How does it work? Using a collaborative approach, we form a team for each client that includes, at a minimum, the CEO, Director and Associate, ensuring we provide the highest level of service and peace of mind to our clients.
- How do we know we can trust you?
  - WE Trust Company was awarded Trust Powers by the Washington State Department of Financial Institutions (DFI) in September 2016, and is now recognized as a trust company in the state of Washington.
  - All employees and owners have passed nationwide criminal background checks.
  - WE Trust is insured and bonded.
  - WE Trust has been, and continues to be, a longtime member of the American Association of Daily Money Managers and the Better Business Bureau.
  - WE Trust enjoys a strong reputation in our business community. We have been in business since 1997, with growth coming predominately from referrals.
  - Discretion: Discretion is of the utmost importance to WE Trust Company. We will never share any of your information without your direct written permission.
  - Security: We have partnered with a local IT firm to ensure that our technology environment is covered by the most up-to-date and comprehensive security controls available.
- What are your fees? We bill hourly. We do not collect fees as a percentage of assets. Rates vary by the need for expertise, and they may change over time as your needs change.
- How do I name you in my legal documents? Please use the following language when identifying WE Trust in your legal documents: "WE Trust Company, a Washington chartered trust company, and its successor and assigns."

[i] The Fiduciary's Handbook, © 2009, The Estate Planning Council of Seattle