YOUR TRUST IS OUR CORE BUSINESS

PEAK TRUST COMPANY

Elevated Trust & Wealth Management Solutions

PROTECTING AND BUILDING WEALTH

Peak Trust Company (formerly Alaska Trust Company) serves individuals, families and their advisors, by offering tax-favored trust situs in either Alaska or Nevada, flexible and customized trust administration solutions and unparalleled service.

Since 1997, our highly credentialed trust professionals have been serving and protecting billions of dollars in trust. With over 200 years of combined experience and knowledge our team is known for handling sophisticated trust administration matters for multinational families, trusts holding unique investments, and trusts created for complex planning goals.

CHOICE OF TRUST DOMICILES:

COMPLETE TRUST ADMINISTRATION, WEALTH MANAGEMENT & FAMILY LEGACY PLANNING SERVICES

We know you have a choice of Trust Companies - most of them are reasonably good at what they do. With more than 20 years of experience and 15+Billion under administration, we've proven that we are amongst the best.

What sets us apart, is our commitment to offering flexible and innovative solutions combined with the deep expertise required to manage even the most sophisticated estate plans.

Trust Administration Services: Built on Flexibility and Choice:

We are committed to giving our clients the highest level of service and choice when it comes to their trust and investment management needs. We believe that our independent, unbundled, flexible and cost-efficient business model has contributed to our success. In building on this commitment, we are proud to offer our clients the ability to choose the jurisdiction that best suits their individual needs- either Alaska or Nevada.

Peak Trust Company provides tailor-made administrative services for all varieties of trusts. Your dedicated trust officer will work with your team to implement the appropriate strategy to meet your needs.

Customized Investment Management:

Peak Trust Company enjoys relationships with a large network of attorneys, financial advisors, CPAs and other family advisors and advocates. For client's who don't have an investment advisor, we offer an integrated approach to wealth management.

For these clients, we work to understand their goals, understand their individual needs, and offer recommendations from a holistic perspective. Wealth accumulation, tax savings and preservation are always at the forefront of our strategies.

Peak Trust Company provides an open-architecture approach to investing. This means that we don't utilize any proprietary products. This benefits our clients by giving them the opportunity to engage the best strategies, without being biased towards or limited by any company's products.

Building on our commitment to flexibility, we can implement and work around any client preferences. These include, but are not limited to socially responsible investing, legacy stock positions, specific views on sectors, and legal restrictions on purchases.

Family Legacy Planning:

Numerous studies have found that around 90% of all families lose their wealth across generations. While bad spending and tax decisions account for part of the failure, the most important factor is lack of communication, trust and preparation within a family.

Our proprietary Family Legacy Planning process helps families define and express what wealth means, identifying the core family values, and grooming heirs to be guardians of both the wealth and values. Our process allows patriarchs and matriarchs to see their legacy begin to unfold while they are around to appreciate it. We make all the critical legal, accounting, and tax work required for estate planning meaningful- by helping families acknowledge the connection between wealth and purpose.

We work with families that want to be intentional in the way they conduct their everyday life (education, recreation, lifestyle, participation in the community, financial investments, use of resources, etc.) in order to pass on what is important and meaningful for them, and what values they want to maintain over the generations.

Some of the tangible takeaways we produce include:

- **Family mission statement**
- **Family Constitution**
- **Video interviews/Story Capture**
- **Family Narrative/History**
- **Checklist of distribution scenarios with recorded decisions on each**
- **Letter of intent from the Legacy Leaders**

> "Throughout the process, I came to know myself better, became close to my beloved Katy and closer to the entire Rhodes family. I left with a sense of belonging, direction and purpose. I was propelled forward, inspired and convicted in areas of life where I was directionless before."
>
> *– Garrett Burleson*

ALL THE TRADITIONAL TRUST SERVICES YOU'D EXPECT:

- **Corporate Fiduciary Services**
- **Self-Settled Trusts**
- **Asset Protection Trusts**
- **Beneficiary Defective Irrevocable Trusts**
- **Incomplete Non-Grantor Trusts**
- **Irrevocable Life Insurance Trusts**
- **Charitable Trusts**
- **Generation Skipping Trusts**
- **Gift Tax Exemption Trusts**
- **Grantor Retained Trusts**
- **Marital Trusts**
- **Community Property Trusts**
- **Special Needs Trusts**

Peak Trust Company's experience and knowledge, in combination with Alaska's and Nevada's unique trust laws, allows us to develop very effective and flexible strategies to meet your needs and objectives. Come find out today how Peak Trust Company can develop a successful strategy for you.

AND SO MUCH MORE…

- Choice of Alaska or Nevada Trust Jurisdictions
- Personal Representative/Executor Services
- Low Life Insurance Premium Tax Structure
- Family Legacy Planning & Conflict Avoidance Program
- Second Opinion Trust Reviews
- Bill Pay Services
- Beneficiary Care Coordination
- Donor Advised Fund
- IRA Services
- Customizable Investment Management Program

"I am so grateful for Matt and Peak Trust for offering Family Legacy Planning. What seemed to he a good program to better understand our family dynamics, turned out to he an opportunity to develop deeper relationships with my grown children and their spouses."

OUR TEAM

MATTHEW BLATTMACHR, CFP
President &
Chief Executive Officer

BRANDON CINTULA, CTFA
Chief Operating Officer

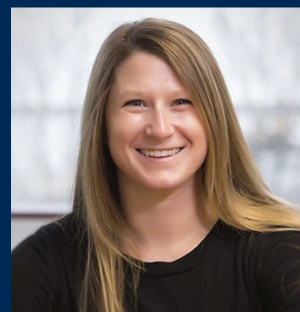
DOUG BLATTMACHR
Co-Founder,
Chairman of the Board

KIM-MARIE COX
Senior Trust Officer

JONATHAN BLATTMACHR
Director of Estate Planning

LISA RUSSELL, CFA
Chief Investment Officer

JANET TEMPEL, JD
Senior Trust Officer



JAMIE ROWLEY
Trust Officer

AMBER GUNN
Trust Officer

CHELCIE ASHWOOD
Nevada Operations Manager

GRETCHEN GRAU
Alaska Operations Manager

DEB ERDMANN
Strategic Partnerships Consultant

PEAK TRUST COMPANY
Elevated Trust & Wealth Management Solutions

ALASKA OFFICE
3000 A Street, Ste 200
Anchorage, AK 99503
888.544.6775

NEVADA OFFICE
1840 E Warm Springs
Road Suite 105
Las Vegas, NV 89119
844.391.2789

info@peaktrust.com
www.peaktrust.com