



MOENIO

~TO FORTIFY, PROTECT

Trust & Investment
Protector Services

Going Beyond Trustee Reviews



MONITOR. VERIFY, AND AUDIT

An Active-360° View as a Trust Protector

Our Difference is Going Beyond What You Expect

When a trust must be guided by others, a family routinely hires a trustee and gives up control. To ensure the trustee is looking out for the best interests of the beneficiaries, it is common for a Trust Protector to be engaged to watch over the trustee.

| It's a start. We go further.

What a Trust Protector Does and Why it Matters

A trust protector stands ready to intercede on behalf of those they safeguard and is hired to ensure the trust and beneficiaries do not suffer unanticipated liabilities such as trustee mismanagement & compliance issues, conflicts of interest between banks and investors and other unforeseen situations.

| That's what is expected. We go further.

MOENIO Simultaneously Protects the Investments

Equally essential is ensuring not just proper stewardship of the trust, but also monitoring how the assets in the trust are being managed. Your legacy was created and is held in your trust. Knowing who is hired and how they manage your assets secures your confidence for future generations.

| A view going beyond the trustee and oversight.



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Full Compliance with Independent Annual Audits

No shortcuts, no auto-pilot, just proven methodologies designed to prevent problems without resorting to panicked reactions to solve avoidable ones. Your peace of mind is our priority, made possible by knowing your trustee is performing effectively and your investments are safe and nurtured.

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With Legacies and Assets Protected, Your Peace of Mind is Assured



Between
Active-360° View

Trustee



Your decision on who should be the trustee is important. If mistakes, issues, or lack of oversight happen, it begins here. That's why our first responsibility is making certain you work with the best trustee.

- ✔ If no trustee is chosen, we conduct an independent search utilizing a 10-point evaluation system to find the best for our clients.
- ✔ We monitor the trustee to make certain they are doing what is right.
- ✔ We conduct a semi-annual audit to make certain they are acting in the best interests of all parties involved.
- ✔ We provide an annual report to all interested parties on the actions of the trustee.



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Investments



You spent a lifetime acquiring your assets. Protecting those assets should be given the proper care and expertise.

- ✔ If no investment advisors or firms have been chosen, we conduct an independent search utilizing a 16-point evaluation system to find the best for our clients.
- ✔ If you currently have advisors, or if we conduct our own search, we will audit your investment advisors, conducting an independent background check on every investment advisor who will be managing your assets.
- ✔ Working with the trustee, we will provide an active review of investments to confirm they match with the goals of the trust and the needs of the beneficiaries.
- ✔ We monitor the trusts's investment returns on a regular basis, actively evaluating what decisions have been made on the trust's behalf and confirming that the investment advisors are acting in the best interest of the beneficiaries.

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Helping Our Clients Manage for the Future

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Trust and Investment Protector Services
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