



Colony Family Offices announces the opening of Colony Trust Company

June 4, 2018 (Charlotte, NC) – The principals of Colony Family Offices® are pleased to announce that they received regulatory approval from the North Carolina Banking Commission to open Colony Trust CompanySM, LLC. It is the first newly chartered North Carolina public trust company in over eight years. Colony Trust Company will provide boutique trustee and estate administration services to families with significant wealth. The creation of an independent trust company was initially based on the idea of solving for the specific needs of existing client families. As a public trust company, Colony Trust Company will be available to offer services to new families as well.

As professional trustees, we have the technical expertise and flexibility to serve families in a variety of ways including:

- Sole corporate trustee with full fiduciary powers
- Co-trustee with an individual trustee to guide them in their fiduciary role
- Directed trustee with a third-party committee, trust protector and/or investment advisor
- Successor trustee to the grantor
- Executor, co-executor or agent
- Trust protector

Colony Trust Company's leadership team is comprised of the following individuals:

- Eric D. Ridenour – President, CEO, Treasurer & Trust Officer
- Kathryn R. Habluetzel – Chief Operating Officer, Controller & Trust Officer
- W. Thomas Byrd – Chief Investment Officer
- C. Shannon Elliott – General Counsel, Secretary & Trust Officer
- Sarah K. Brock – Chief Compliance Officer & Trust Officer
- David M. Parker – Portfolio Manager & Trust Officer

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Our officers will serve under the direction of the Board of Directors which include key officers and three external board members: T. Michael Henderson, Marshall T. Walsh and Carter G. Thompson.

We will serve client families by exercising sound and prudent judgement based upon our fiduciary duties, experience, and collective knowledge. By truly understanding our families, we can be nimble, flexible, and practical in serving their needs.