



CALDWELL TRUST COMPANY

PERSONAL • TRADITIONAL • INDEPENDENT

— A Legacy of Stability —



Whether its protecting special needs children, helping new to the area families take root, assisting those who lose their spouse, advising a newly divorced person on how to start anew, or providing keen financial knowledge, the women at Caldwell Trust Company understand, listen and support with unmatched expertise and compassion. They continually deliver superior one-on-one client service, absolute accessibility, and give back to this community with very giving and passionate hearts. Area attorneys and CPAs know them well and appreciate their professionalism, attention to detail, as well as their outstanding communication skills every step of the way to achieve a successful outcome for all parties involved.

Their commitment to area boards such as Boys & Girls Clubs of Sarasota, Make-A-Wish Foundation, SKY Academy, Tidwell Hospice, and Sarasota County Search and Rescue speaks to their high standards of commitment and integrity.



These are the ladies of Caldwell Trust Company. From left to right, Sheryl Vieira, Assistant Vice President of Marketing, Jan Miller, Executive Vice President, Sonya Kristie, Assistant Vice President and Trust Officer, Ashley Harrison, Assistant Vice President of Operations, Susan Hines, J.D., Vice President and Trust Officer, and Wendy Fishman, Executive Vice President and Senior Trust Officer.

Privately-held Caldwell Trust Company, with its experienced and dedicated staff, promises a stability of leadership, a tradition of service, and a legacy of trust from generation to generation.

Venice | 1400 Center Road | Venice, FL 34292 | 941.493.3600
Sarasota | 1561 Main Street | Sarasota, FL 34236 | 941.926.9336