



Corporate Overview & Fact Sheet

Caldwell Trust Company was founded in November of 1993 to provide personal, traditional and independent trust services. Since that time, Caldwell Trust Company has enjoyed continued success by remaining true to the same tenets that management outlined in our original charter application. Simply stated as follows:

- To provide our clients with highly personalized one-on-one attention and care;
- To work to retain clients and build loyalties that result in multi-generation relationships;
- To contain our costs, and thereby client account fees, by doing everything internally, using the latest in electronic technology, which allows us to provide better service for less.

Since receiving our charter from the State of Florida in 1993, our business has continued to grow through individuals who are attracted to a trust service provider that sincerely believes in giving clients what it promises, including quality investment management and estate planning. We can and do meet a need that is not being filled by conventional providers at larger financial organizations, where fees increase and traditional trust services are abandoned in favor of brokerage and mutual fund-type activities.

Caldwell Trust's focus is providing fiduciary and investment management expertise to individuals, families, foundations and organizations. We are relationship driven; working with clients, their families and their advisors in matters of investment management, estate planning, tax planning, trust administration, estate settlement and retirement planning.

HISTORY: Founded in 1993 by Roland Caldwell and his son RG "Kelly" Caldwell, President and CEO, Caldwell Trust Company is an independent privately owned trust company headquartered in Venice, Florida with offices in Sarasota, Florida.

SERVICES: Investment Management | Estate Planning | Tax Planning
Trust Administration | Retirement Planning

OWNERSHIP: RG "Kelly" Caldwell, CEO & President

EXECUTIVE LEADERSHIP: RG "Kelly" Caldwell, CEO & President
H. Lee Thacker, Jr., CFP
Wendy Fishman, CTFA
Jan Miller

MANAGEMENT: Nearly \$1 billion in assets under management

Stability, Integrity, Trust

the old-fashioned values that form the cornerstone
of our client relationships



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