TrustPoint

Family Office

Securing Your Family's Future

OUR *Family* SERVING YOURS

TRUSTPOINT
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The Trust Point Family Office is a specialized division serving the unique needs of select individuals and families.

We're conscious of the fact that your family is like no other. Our team of experienced, knowledgeable professionals is dedicated to understanding your specific needs and values, and executing a plan that meets your goals.

Always at your side

I learned the value of hard work, community, and exemplary service from my parents, who are third-generation farmers and independent insurance agents. At our house, everyone had a job to do, and those experiences laid the groundwork for my career.

In supporting my clients today, I take the same approach that helped build my family's success. I meet clients where they are and act as the quarterback to develop a plan around their vision, knowing that listening, learning and understanding a family's values is key to any successful execution.

Whatever life brings, the Trust Point Family Office is at your side, ready to guide you every step of the way.

—Christine Schmidt, CFP®,
Managing Director, Family Office

Services

TAILORED TO MEET YOUR NEEDS

Our professional team includes attorneys, accountants, financial planners, investment advisors and analysts, and administrative experts, all working toward the common goal of serving your financial objectives.

Trust Point's Family Office will meet with you and your family to learn about your needs, goals, challenges, opportunities, and concerns. We provide customized solutions with the highest level of service to give your family absolute financial confidence.

Clients benefit from us offering trust services under the same roof.

BUSINESS

- Retirement & benefit plan services
- Succession planning
- Investment options for liquidity events

ESTATE PLANNING

- Administration
- Transfer of wealth between generations/charities

TRUST

- Special needs trusts
- Corporate trustee services
- Administrative support to family trustee

You

INVESTMENTS

- Strategic advisor
- Alternative investment strategies
- Risk management
- Social impact investing
- Portfolio manager selection oversight

FAMILY

- Next generation financial education
- Family charters & governance
- Meeting facilitation
- Family legacy
- Family dynamics

WEALTH

- Wealth preservation
- Tax strategies
- Annual exclusion gifting
- Consolidated reporting
- Cash management & bill pay

GIVING

- Philanthropic strategies
- Foundation creation & support
- Charitable trust administration

We do the bill pay for our clients so they don't have to worry about it.

Caring FOR *Clients*

The families we work with come in many structures and sizes and their needs are just as diverse. Here are a few examples of the work we've done:

BRIDGING GENERATIONS

We were working on an estate plan with a client who named his son Power of Attorney as well as co-trustee and personal representative of the estate. The client wanted to ensure a smooth transition of his wealth, so he turned to us for investment management services and support.

To build a strong understanding of the client's wishes, we met regularly with him and his son until the client began struggling with Alzheimer's Disease. We shifted our meetings to the son and supported him in handling all of his father's affairs, including managing tax payments, annual exclusion gift planning for his grandchildren, and charitable giving.

When his father passed, we continued to help the son with the transition process, including coordinating with his attorney and accountant to ensure all deadlines were met. We also communicated with other family members, relieving tension. Good planning and communication across generations led to a smooth transition of assets and peace of mind.

FAMILY CFO

In most families, the responsibilities of running a household are not much different than running a business. Roles are divided based on time, availability or skill. At the Trust Point Family Office, we can act as the quarterback to manage the workload and guide family members in their roles.

In one instance, a client who handled all of the family finances was concerned that their spouse and children wouldn't know where to start if the work fell to them. At first, the client asked for support with bookkeeping and bill pay, but after talking more in depth about their concerns and objectives, we developed a deeper plan.

We first took inventory of their assets and insurance accounts, consolidating IRAs and investments. We took over the management of their investment portfolio and tax payments and developed a plan to facilitate all of their household bill payments, including the bills for a secondary residence. We even discovered gaps in their property and casualty insurance and met with their insurance agent to undergo a comprehensive review of their coverages.

With help from the Trust Point Family Office, the client and family now feel confident in their financial future.

EDUCATING FAMILY SUCCESSORS

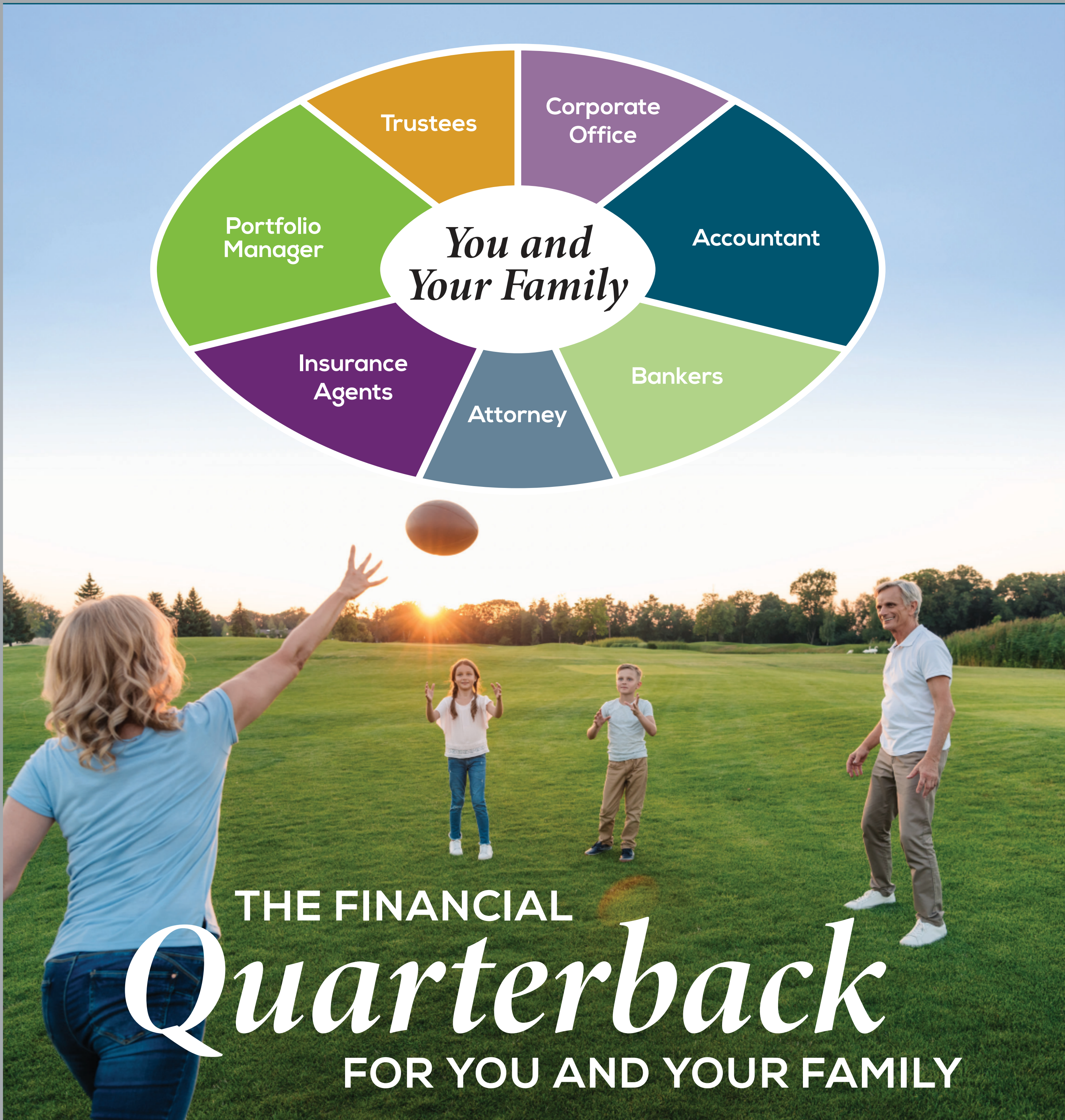
The owner of an established, successful business was looking for help educating the next generation of family ownership.

The owner had already organized several family meetings, inviting presenters on various topics, but the meetings felt disjointed—he wanted to establish a consistent, comprehensive education plan. We initially met with the owner to learn about the family, the business, plans for succession and the long-term vision for the business and the family ownership.

We then created an inventory of the topics previously covered with the family and developed an education plan in alignment with the owner's goals. Getting the next generation involved early through surveys and small group meetings helped engage them in the process. Topics in those small groups ranged from family governance to philanthropic philosophy to company culture and history. We then included the full family in a series of meetings, with required attendance to ensure a consistent message was delivered.

The education program continues today, evolving with the business to help ensure its continued success. It has laid the groundwork for a successful business transition and created peace of mind for the owner.

We allow you to focus on what you enjoy most in life.



THE FINANCIAL *Quarterback* FOR YOU AND YOUR FAMILY

Collaboration is key. We know it often takes a team of people to meet your financial goals. Think of us as your quarterback, guiding your family and your financial partners to the ultimate win—long-term wealth security and growth.

$7.5B
in assets under management

100+
years of diverse wealth-management experience

G5
5 generations of families supported

EXPERIENCE WITH *Trust*

CHRISTINE SCHMIDT

CFP®, Managing Director, Family Office
608-527-0871 / 612-339-2343

Christine has worked with financially successful families for more than two decades. As the Managing Director of the Trust Point Family Office, she engages client families in preserving and building assets across multiple generations. She advises and educates on the complexities that come from managing significant wealth to ensure finances and life goals are aligned with the family's values. Christine acts as a dedicated advocate for families, working with other professional advisors and pulling from her diverse experience in estate planning, trust administration, investment management, family governance, and philanthropic strategies.

RANDY VAN ROOYEN

CFA®, Senior Vice President, Strategic Relationships
608-782-1148 / 608-470-7720

Randy has spent over two decades leading Trust Point's investment area and is a driving force behind the investment philosophy and strategy, which has contributed greatly to the growth and success of the company. Randy is well-versed in working with individuals, families, executive management teams, and the board of nonprofit organizations. He possesses a deep understanding of clients' financial and operational needs and executes solutions ensuring their investment strategies are aligned with their goals.

BRIAN KOOPMAN

CFP®, CFA, Chief Operating Officer
608-782-1148 / 608-470-7720

As Chief Operating Officer, Brian plans and executes strategies to help ensure the continued success of the organization. He has oversight for the following departments: wealth management, trust administration, investments, retirement plan services, the Minneapolis office, including the Family Office, and the financial planning function at Trust Point. Brian is a trusted advocate as his experience has given him vast insight into a variety of wealth-related issues.

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