

Mission Management & Trust Co. offers extraordinary trust and investment services to both Arizona and national clientele, and has been recognized for exceptional performance and service to clients through personalized, custom-tailored approaches to trust services. Established in 1994, Mission is licensed, regulated, and examined by the State of Arizona Department of Financial Institutions.

As a corporate trustee, Mission combines a best interest focus with a team approach to ensure the successful administration of a special needs trust. Mission periodically reviews the beneficiary's best interests through annual special needs assessments. In addition to Mission's team of experts, who specialize in the intricacies of trust administration and investment management, Mission collaboratively partners with the beneficiary's family, agents under powers of attorney, personal attorney, established professional advisors, and industry specialists to effectively manage the trust's assets and serve the beneficiary.

### *Fiduciary Services*

- Annual coordination of public benefits
- Annual review of disability and medical status
- Oversight of case and care management
- Balancing personal and physical needs with financial needs
- Preparation of annual budget
- Annual financial reports
- Periodic account statements
- Record-keeping and accounting
- Home maintenance, including periodic inspections, payment of insurance and property tax
- Coordinating professional services
- Tax preparation, facilitating trust and personal returns
- Year-end tax statements
- Insurance evaluation to maintain or access appropriate coverage
- Daily cash sweep
- Collection of investment proceeds
- Income collection and disbursement
- Cash flow analysis
- Bill paying for approved services and expenses

### *Investment Management Services*

- Management of trust investments that emphasize preservation of capital
- Asset allocation
- Regular investment reviews
- Investment planning
- Investment of assets according to trust agreement
- Security selection
- Portfolio development