



# T R U S T

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Trust.

Strong relationships require it.

A successful trust relationship relies upon it.

San Pasqual Trust believes a trust estate is not just an accumulation of assets, but a well-planned legacy that extends beyond an individual's life.

Understanding the importance of trust has inspired our strategic approach to trust management.

Personal service with professional standards.

Together they are the hallmarks of our firm, ensuring that your family benefits now, tomorrow and beyond.

# UNDERSTANDING TRUST

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Build a relationship where trust and client interests are paramount. These relationships protect the assets in your portfolio and allow wealth to pass to future generations. Our clients benefit from the reassurance and stewardship that a trust provides.



trust [truhst] -noun

something (as property) held by one party (the trustee) for the benefit of another (the beneficiary)

**Understanding the multifaceted meanings of trust and integrating them into our firm is not only our philosophy but also our standard practice. Meet San Pasqual Trust and gain insight into a management style where we earn the trust of our clients through a thoughtful and professional approach.**

### **OPENING THE DOOR TO INNOVATIVE IDEAS.**

Concentrating on the unique requirements of each client and their priorities and objectives, our professionals will apply their skills across planning, administration and succession. The results are customized solutions carefully researched and strategically implemented.

### **FOSTERING A COMMITMENT TO PERFORMANCE.**

Because trust management is the center of our business, our attention is focused on customized service, independent investment management and appropriate performance standards to serve the enduring needs of the trust.

### **YIELDING LONG-TERM BENEFITS.**

Success patterns that benefit current and future generations can be developed with a dedicated and qualified management team. Our firm understands how to extend the values embedded in a trust over multiple generations with a balance between family interests and asset management.

### **GIVING YOU PEACE OF MIND.**

Placing your trust in our hands gives you a skilled team of professionals who have come together to serve their clients with responsibility and dedication. Our legacy is the successful extension of this trust relationship.

# T R U S T

Our clients are the center of our business. Each strategy we develop, each project we undertake and each solution we implement stems from a mutual understanding of identified goals.

## OUR ASSET IS YOUR TRUST

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trust [truhst] -noun

1. the trait of believing in the honesty and reliability of others
2. something committed or entrusted to one's care for safekeeping

**San Pasqual Trust holds the conviction that personal service is the cornerstone of a successful relationship. As a result, we provide only the highest level of professional service to grantors and beneficiaries.**

Professional continuity is at the core of San Pasqual Trust's client-centered approach. San Pasqual Trust makes certain that each grantor's directives are upheld in perpetuity. Successful investment strategies implemented today are extended for the benefit of future beneficiaries.

Institutional continuity combined with an established relationship between grantor and trustee provides unparalleled service combined with comfort and security for family members.



# TRUST THE HYBRID ENTITY

PRIVATE

INSTITUTIONAL

Providing the stability and continuity of a regulated trust company with the expertise and attention of a private trustee, San Pasqual Trust offers a unique approach to trust services.



trust [truhst] -verb

1. to invest with a trust; entrust with something
2. to have trust or confidence in; rely or depend on

Recognizing the need for institutional continuity and customized care in a single, dedicated entity, we have created a hybrid organization to serve our clients' trust management interests above all else. San Pasqual Trust is organized under California law and regulated by the California Department of Financial Institutions. Dedicated to a high standard of service, San Pasqual Trust is a strategic advisor: a private, institutional trustee.

#### PRIVATE TRUSTEE:

- A dedicated relationship with an advisor who has insight into a client's complete financial picture
- Highly skilled professionals with a focus on strategic planning and trust management, tax strategies, and philanthropic objectives
- A commitment to implementing your objectives across future generations
- Experienced and accessible advisors who focus on unique concerns

#### INSTITUTIONAL TRUSTEE:

- Licensed and bonded, ensuring the highest level of professionalism and accountability
- Using institutional trust accounting and administration systems
- Examined and regulated with statutory capital reserves, providing institutional stability
- Corporate continuity beyond any individual's lifetime
- Composed of a team of highly respected legal and financial professionals who bring extensive senior management experience in financial firms and institutional trust companies

As a California domiciled trust company with an open-architecture approach, San Pasqual Trust is in a rare and unique position not just to manage a client's trust, but to truly serve that client's needs and interests.

## TRUST THE INDEPENDENCE

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trust [truhst] -verb

to permit to remain or go somewhere or to do something without fear of consequences



San Pasqual Trust does not provide investment management services. Instead we utilize third-party investment professionals. We believe this will enhance the long-term performance of your trust portfolio. In the exclusive role of trustee, we remain committed to delivering superior professional trust services.

**A VISIONARY BUSINESS MODEL KEEPS  
YOUR TRUST IN FOCUS.**

San Pasqual Trust is able to concentrate its resources on trust management, providing exceptional planning, continuity, succession, administration and advisory services.

**STRINGENT OVERSIGHT ENSURES  
CONSISTENCY AND INTEGRITY.**

It is our role and obligation to coordinate and monitor the activity of third-party investment, brokerage and real-estate firms. Our clients benefit from uniformly sound, unbiased investment advice and services.

**OBJECTIVITY AND CUSTOMIZED CARE  
SECURE YOUR TRUST'S FUTURE.**

Succession strategies at San Pasqual Trust are designed to respect the interests of future generations and a family's legacy. Clients are assured a trustee free from biases that may result in liquidation and repositioning of assets into proprietary managed accounts.

**DEDICATED PERSONNEL PROVIDE  
UNPARALLELED SERVICE.**

San Pasqual Trust's officers specialize in trust management, and each handles a limited number of relationships. As a result, each of our experts is accessible, accountable and committed.

# TRUST DERIVES FROM EXPERTISE

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A vast wealth of knowledge, a diverse portfolio of skills. San Pasqual Trust comprises a complementary team of highly regarded professionals from its founders to its directors.

trust [truhst] *-noun*

1. certainty based on past experience [syn: reliance]
2. a trustful relationship [syn: confidence]



**Our expertise and abilities produce a remarkable service level based on comprehensive, customized and continuous trust management service.**

The San Pasqual Trust team represents more than a century of combined professional experience from trust design and administration to litigation management. Diverse, seasoned and committed to a unique fusion of independence and accountability, our group has come together to serve the needs of families who have entrusted San Pasqual Trust with a great responsibility.

The firm's core expertise encompasses trust and estate law, investment management, financial services and philanthropic strategy. In addition, our independent directors are authorities and advocates for the long-term success of the institution and its clients. Together, this team looks forward to taking on new challenges and serving its clients.

**PHILIP V. SWAN** *Chairman*

**RICHARD S. ARNOLD** *President*

**RICHARD H. PATTERSON** *Chief Fiduciary Officer*

**LEEANN W. DAVIS** *Chief Financial Officer*



**SAN  
PASQUAL**  
T R U S T

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Trust our understanding, independence and experience. Establish a relationship with San Pasqual Trust and be confident that your estate will be managed with strategic rigor and consummate care. San Pasqual Trust is an investment in the value of your trust, now and for generations to come.

San Pasqual Trust.

Personal service with professional standards.

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TRUST personal service  
with professional standards