

## Information Sheet - Amicus Trust Company, LLC

- Amicus Trust Company, LLC (“Amicus Trust”) is a state chartered and regulated trust company that offers trust services to personal injury victims and their families.
- Amicus Trust is owned by PlanFirst, Inc. along with three sister companies: Amicus Financial Advisors, LLC, Amicus Settlement Planners, LLC and Amicus Wealth Management, LLC. Amicus Trust received its trust company charter from the South Dakota Division of Banking in 2021. The Amicus family of companies were built to meet the wide-ranging financial needs of personal injury victims and their families. Together, these companies manage over \$360,000,000 in trust and investment funds for clients.
- Amicus Trust serves in a fiduciary capacity for a variety of trusts created specifically for injured and disabled individuals including:
  - Court-ordered Trusts
  - Spendthrift Trusts
  - Special Needs Trusts
  - Asset Protection Trusts
- Amicus Trust’s headquarters and primary administrative office is located in Sioux Falls, South Dakota. Amicus Trust has contracted with Tombs Maxwell, LLP in Lubbock, Texas to assist in legal and administrative duties.
- Amicus Trust utilizes an investment policy statement for each trust account. Each trust is invested in a portfolio comprised of fixed income, equity, and money market funds. The primary investment objectives for each account includes preserving capital, generating income, maintaining liquidity and long-term growth.
- Amicus Trust delegates the management of trust assets to Amicus Financial Advisors, LLC which has been serving the needs of injury victims and their families since 2005.
- As a regulated trust company, Amicus Trust is subject to rigorous banking laws and regularly scheduled examinations by the South Dakota Division of Banking.
- Trust assets are protected by law and cannot ever be used to pay the creditors of Amicus Trust or PlanFirst, Inc. All trust assets are held in the custody of third-party custodians including Charles Schwab Institutional and Dacotah Bank. In the unlikely event Amicus Trust were to become insolvent, trust assets would remain untouched and a successor corporate trustee would immediately be appointed to manage its trust accounts and assets.