



IT'S A MATTER OF TRUST

Capital First Trust Company Information Sheet

- ◆ Capital First Trust Company (Capital First) is a state chartered and regulated trust company that provides trust services to personal injury victims and their families throughout the country.
- ◆ Capital First received its trust charter from the South Dakota Banking Commission on March 17, 1999. The roots of the trust company were established in 1984 when Capital First served as a trust service administrator to First National Bank of Chicago, U.S. Bank, Harris Trust Company, and others.
- ◆ Capital First has over \$1 billion of assets under management as of January 2020 and has administered over 2,500 accounts since its inception.
- ◆ Capital First serves in a fiduciary capacity for a variety of trusts created specifically for injured and disabled individuals including:
 - Special Needs Trusts
 - Settlement Preservation Trusts;
 - Settlement Asset Management Trusts;
 - Asset Protection Trusts;
 - Revocable Trusts; and,
 - Medical Reversionary Trusts.
- ◆ Experienced Trust Officers perform trust administration at the Capital First trust service offices located in Milwaukee, Wisconsin and Sioux Falls, South Dakota.
- ◆ Capital First utilizes a mix of fixed income, equity, and money market common trust funds to safeguard and invest trust assets. The three primary investment objectives for all trust assets is the preservation of capital; liquidity; and, long-term moderate growth.
- ◆ Capital First will, in certain cases, serve as a directed trustee or delegate the management of trust assets to an outside professional investment advisor.
- ◆ As a regulated trust company, Capital First is subject to rigorous banking laws and is regularly examined by the banking examiners.
- ◆ Trust assets are protected by law and cannot be used to pay Capital First's creditors. All trust assets are held in custody at Bank of New York Mellon and Fidelity.
- ◆ In the unlikely event that Capital First becomes insolvent, trust assets will remain untouched and a successor chartered trustee will immediately be appointed to manage all trust accounts and assets.

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