



**True Link**  
Financial

Pooled  
Special Needs  
Trusts (PSNTs)



## Investment advisory services and trust recordkeeping platform for pooled SNTs

**Designed for beneficiaries**  
**Built for fiduciaries**

[www.truelinkfinancial.com/pooledSNT](http://www.truelinkfinancial.com/pooledSNT)

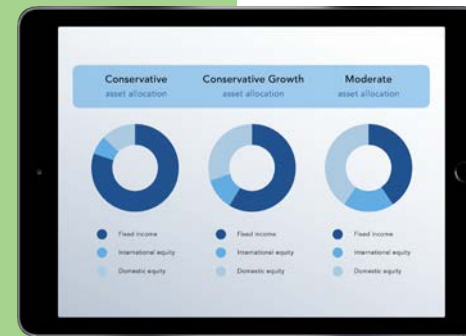
The wellbeing of your beneficiaries is at the core of all our financial solutions – just as it is for you.

Pooled SNT trustees use our software to execute disbursements, generate reports, and track budgets while streamlining their recordkeeping and accounting.

Our diversified investment portfolios are built to carefully balance risks and returns while managing the liquidity needs of the overall pool.

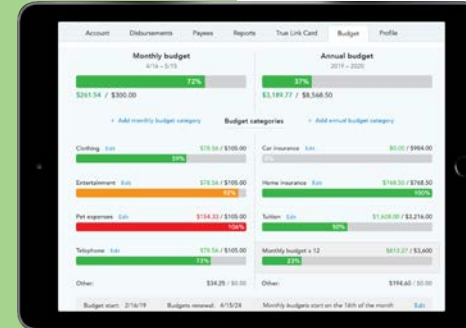
### With our fully integrated platform, you can:

- 1 Streamline your reconciliation processes and synchronize payments, bookkeeping, and accounting under one unified system.
- 2 Balance the cash needs of the trust based on our analysis of disbursement patterns so that an appropriate amount of funds can remain invested.
- 3 Coordinate disbursements with beneficiary budgeting and financial planning in real-time.
- 4 Save time by automating sub-accounting and fee calculations at the beneficiary level.
- 5 Help protect government benefits by integrating with the True Link Protection Visa® Prepaid Card and setting up spending controls via the True Link dashboard.



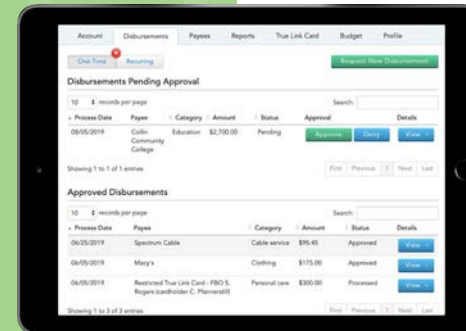
## Multiple investment portfolios

Our platform makes it easy to select the investment portfolio that matches beneficiaries' unique profiles and long-term needs. Choose different portfolios for different beneficiaries within the same pool.



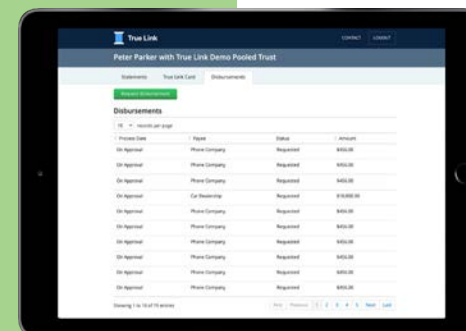
## Beneficiary-level budgeting tool

Help your beneficiaries plan and manage day-to-day and long-term spending with our straightforward budgeting tool.



## Tech-driven, easy-to-use disbursements and payment processing

Enable dual-control approval and processing of discretionary distributions via check, electronic payment, or the True Link Card.



## A portal for your beneficiaries

Provide your beneficiaries and their advocates online access to download statements and transaction history, view key account information, and make disbursement requests.

## Why True Link?

*We know enhancing quality of life for your beneficiaries is your top priority. It's ours too. Our mission is to increase the independence and financial wellbeing of individuals with disabilities, vulnerable elders, and adults with mental health conditions. We are deeply honored to serve this community by providing financial solutions for pooled special needs trusts.*

### Team of SNT Experts

- Nationally recognized experts in special needs trusts
- Deep expertise in the needs of beneficiaries informs our investment products and services

### Built for SNTs

- Designed specifically to meet the needs of SNT trustees, our pooled trust recordkeeping platform can save you time and provide even more value to your beneficiaries
- Focused on beneficiary needs: budgeting, investment plans, benefits eligibility, and communication

### Disciplined Investment Approach

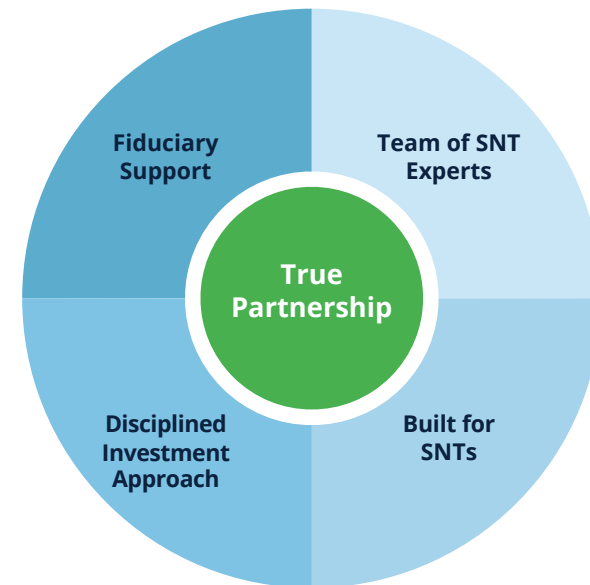
- We seek to offer diversified investment portfolios aligned with the principles of the Uniform Prudent Investor Act
- Our portfolios are built with the goal of capturing market returns while carefully managing risk and minimizing the impact that fees, taxes, and excess cash can have on returns

### Fiduciary Support

- Built-in feature to create necessary reports for beneficiaries, courts, and other third parties
- System designed with controls, documentation, and workflows to support pooled trust management

### True Partnership

- Dedicated relationship management to ensure effective partnership
- Commitment to flexibility, creative problem solving, and innovation



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Get started: 888-575-5143

Customer support: 877-264-8783

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True Links' recordkeeping platform is offered by True Link Financial, Inc. True Link Financial does not offer legal or tax advice. Please consult the appropriate professional regarding your individual circumstance.

