

## Personal Trust Services FAQs:

### Why would I include a trust in my estate plan?

A trust is a flexible legal tool that manages assets and distributes funds to chosen beneficiaries.

### Can Ronald Blue Trust serve as the executor of my estate?

Yes. By naming Ronald Blue Trust in your estate planning documents, you place the responsibility of managing your estate with professionals who are experienced in these important duties. We will work with your attorney and your family to ensure the smooth and accurate disposition of your property and the execution of your final wishes, according to the terms of your will.

### What should I consider before appointing a corporate trustee?

Take time to find a trustee that is right for you. That person or institution should be knowledgeable in managing investments. Ronald Blue Trust has experience in the investment, tax, legal and administrative duties of a trustee or executor. Our professionals are impartial about conflicting or competing family desires, which may help preserve family harmony. In addition, we work under stringent government regulations designed to protect your interests.

### How do I name Ronald Blue Trust as a successor trustee of my trust or executor of my estate?

Contact us for a copy of our preferred trust and will language memorandum. We will review your estate plan relative to that memorandum at no charge.

Be sure to forward copies of any documents that name Ronald Blue Trust in a fiduciary capacity (e.g., trustee, personal representative or executor) to us. There is no charge or service fee for safekeeping of an estate planning document in which we are nominated to serve. You will only incur fees if we serve in a fiduciary capacity.

### Can Ronald Blue Trust draft a trust document for me?

No. We are not authorized to draft estate planning documents. Since a trust agreement is a legal arrangement, you will need to discuss its provisions and your requirements with your estate planning attorney.

### What is the minimum amount necessary to open a Personal Trust Services account?

The minimum amount required is \$300,000.

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