



CORPORATE OVERVIEW FACT SHEET

As the largest independent, employee-owned investment management and trust company in Florida, Sabal Trust Company has been providing trusted wealth advice to affluent individuals and families for more than 30 years. Sabal Trust's professional and dedicated advisors provide customized investment management, IRA, trust and estate settlement services for individuals, corporations and nonprofits.

FAST FACTS

HISTORY: Sabal Trust and predecessor companies trace its history to 1983.

LOCATIONS: St. Petersburg • Sarasota • Tampa • The Villages

SERVICES: Investment Management • IRA Services
Trust Administration • Estate Settlement

OWNERSHIP: Employee Owned

EXECUTIVE LEADERSHIP: Ward J. Curtis, Jr., Chairman
Bryant N. Jones, President
Laurence R. Fasan • Susan S. Mittermayr
G. Lowe Morrison, CFA • Scott L. Pieper, CFA
Gerard J. Lachnicht, CFA

MANAGEMENT: \$2 billion in assets

COMMUNITY INVOLVEMENT

Since our founding, Sabal Trust Company has supported many local nonprofits and charities through sponsorships of major fundraising events and a significant commitment of resources and service. Because we are a local, employee-owned investment management and trust company, we believe that investing and partnering with the communities we serve solidifies our long-term relationships and commitments.

For more information, please visit www.sabaltrust.com

Office Locations

ST. PETERSBURG

One Progress Plaza—Downtown
200 Central Avenue, Suite 220
St. Petersburg, Florida 33701

P. 727.824.8700
Toll Free 866.447.2225
F. 727. 822.3423

SARASOTA

1800 Second Street, Suite 103
Sarasota, Florida 34236

P. 941.556.0760
Toll Free 866.243.2540
F. 941.556.4869

TAMPA

Corporate Center II—International Plaza
4211 West Boy Scout Boulevard,
Suite 190
Tampa, Florida 33607

P. 813.229.2180
Toll Free 800.274.2180
F. 813.223.7646

THE VILLAGES

1060 Lake Sumter Landing
The Villages, Florida 32162

P. 352.751.2199
Toll Free 866.751.2199
F. 352.750.5096

SABALTRUST.COM

ST. PETERSBURG | 727.824.8700
TAMPA | 813.229.2180

SARASOTA | 941.556.0760
THE VILLAGES | 352.751.2199

Sabal Trust
Company



YOUR LIFE. YOUR LEGACY.