

Alaska Trust Company

Providing Complete Trust and Investment Solutions

Alaska Trust Company isn't the average trust, investment management and financial planning firm. The Anchorage-based company maintains a nimble, adaptive stance that completely caters to clients' needs. Consequently, it offers more personalized and customized services than the typical big bank, according to Trust Officer Matt Blattmachr. "We try to be very flexible," he says. "We keep ourselves easy to work with and innovative."



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Trust Officer Matt Blattmachr, CFP®, Alaska Trust Company



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Chief Investment Officer Lisa Russell, CFA®

In fact, innovation is a key component of the company's success. Established as the state's first independent trust company in 1996, Alaska Trust Company was instrumental in the creation of the 1997 Alaska Trust Act—whose laws have been applied to more than a dozen other states. The company remains on the leading edge by constantly expanding its service offerings and using a think-tank of estate planning advisors to work on enhancing existing laws.

Alaska Trust has differentiated itself by its expertise, adaptability and customer-centered service. It employs a distinctive approach to investment management by using a Unified Managed Account (UMA) to assist clients. A UMA—a professionally managed account that can encompass every asset class and investment style—allows clients to receive comprehensive asset allocation and superior diversification while inte-

grating the research of top-tier managers. "Whether your account is in a trust, IRA, or brokerage-type account, Alaska Trust Company will customize it to your needs using a UMA approach," says Chief Investment Officer Lisa Russell.

JUST FOR YOU

One of the benefits of a UMA is that it enables Alaska Trust to custody the assets so there are no funds being sent directly to outside money managers. It provides access to top-tier money managers in every asset class that most people cannot access due to their steep minimum investments or because they are closed. UMA also can minimize the tax implications of investing using overlay software, as well as help control turnover and implement tax-loss harvesting, which studies have proven can greatly increase the net return to the client. Furthermore, UMA allows for client mandates and restrictions such as socially responsible investing, legal restrictions on stock purchases, legacy low-basis holdings, tax budgeting, and specific views on sectors.

Alaska Trust offers an array of financial solutions in an unbundled structure. Because the company doesn't have proprietary products, its clients can count on receiving unbiased recommendations. Alaska Trust prioritizes the needs of clients and customizes every portfolio to what they want—not what is best for the company. "Your portfolio does not

just get put into a generic model," Russell says. "The bottom line is the client will always come first."

EXPANSION IN WORKS

As part of its commitment to put clients first, Alaska Trust is constantly making enhancements. The company is also looking to become more involved in the community. It currently supports a number of charitable organizations, including the Anchorage Senior Activity Center.

Alaska Trust Company serves a broad range of clients, from those with a high net worth to those who need help managing their IRA. Alaska Trust Company has management authority of over \$1 billion of assets and serves a broad range of clients. Regardless of their size, all clients receive the same level of superior service.

For more information contact

Alaska Trust Company
 Matt Blattmachr, CFP®
 Trust Officer
 1029 W. Third Avenue, Suite 400
 Anchorage, Alaska 99501
 Phone: (907) 278-6775
 Fax: (907) 258-1649
 Website: www.alaskatrust.com