



AAFMAA[®]

COMPASSION • TRUST • PROTECTION

AAFMAA Wealth Management & Trust LLC

Preserve Your Legacy

Why Trust Services are right for you

Presented by Christina Dell'Aquila, Senior Relationship Manager

Our Mission

Our Mission: to be the premier provider of financial planning, investment management, and trust services to the American Armed Forces community.

AAFMAA Wealth Management & Trust LLC

A Wholly Owned Subsidiary of the American Armed Forces Mutual Aid Association


- Proudly serving America's Armed Forces since 1879
- Non-profit, Tax Exempt (501[c](23)), Member Owned Mutual Aid Association offering Life Insurance
- Open to all branches of the U.S. Armed Forces and their families (children age 23 and under)
- Two fully owned subsidiaries:
 - AAFMAA Wealth Management & Trust: Financial Planning, Investment Management, and Trust Services
 - AAFMAA Mortgage Services: Mortgages, Home Construction and Financing



DISCLAIMER

- Not specific investment or tax advice, we provide innovative, personalized, and lifestyle-appropriate financial services.
- Bound by a **fiduciary standard** - any advice or service we offer must always be in the best interest of the client.
- Serving U.S. Armed Forces community





“It’s not how much money you make, **but how much money you keep**, how hard it works for you and how many generations you keep it for.”

- Robert Kiyosaki

Preserve Your Legacy

You want the **confidence and peace of mind** that comes from knowing our professionals will help carry out **your vision** for your family, working with a trust company **exclusively focused on the military community.**

Trusts can help **protect your family's assets, provide asset management, and control the delivery of assets for your future generations.** But do you have someone who is capable of managing your trust when the time comes?



Professionals at **AAFMAA Wealth Management & Trust (AWM&T)** can serve as your trustee.

Helping Military Families with Trusts

Situations where a trust will help:

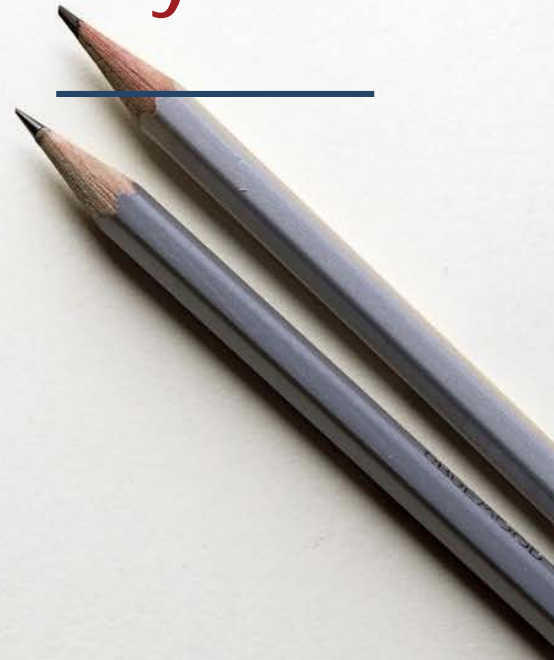
- Asset distribution according to your plan
- Protection from creditors
- Spousal distributions
- Protecting a child's inheritance
- Protecting assets for future generations



Which type of Trust is right for you?

———— Different Trusts to consider: ————

- Revocable Living Trusts
- Irrevocable Trusts
- Charitable Remainder Trusts
- Charitable Lead Trusts
- Testamentary Trusts
- Special Needs Trusts





Why should you work with us?

*A trust company
dedicated to serving
military families*

We will **administer and manage** the trust's assets to the document's **exact specifications**, including:

- Making payments as directed by the trust
- Exercising discretionary distribution powers
- Protecting your assets according to your intentions
- Communicating regularly with beneficiaries
- Maintaining comprehensive records
- Preparing required records, statements, and tax returns

Questions?

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Disclosures

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- The information presented herein was compiled from sources believed to be reliable. It is intended for illustrative purposes only and is furnished without responsibility for completeness or accuracy.
- Market views are as of the presentation date and are subject to change at any time or reason. Nothing in this presentation should be construed as a recommendation for any specific security or sector. Illustrative charts were obtained from multiple subscription based sources and are subject to provider terms and conditions.

Thank You!



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