

*One source.  
A wealth of opportunities.*



*THE SOURCE*

MIDWEST TRUST  
FINANCIAL COUNSELORS, INC.  
MIDWEST PHILANTHROPIC  
& INSTITUTIONAL SERVICES, LLC

## Who Is Midwest Trust?

A full-service wealth management institution formed in 1993 as an independent state chartered trust company, offering complete trust services in the area of personal trust administration, estate planning, investment management, retirement and investment planning, profit sharing and 401(K) programs.

Midwest Trust is the company in MTC Holding Corporation dedicated to providing the highest level of professional care and personal trust services to each of our clients.

## How Can Midwest Trust Company help you or your organization?

We provide strength and reliability with local expertise and services for your personal and corporate strategies.

- Comprehensive trust administration
- Investment advisory services, with affiliate Financial Counselors, Inc.
- Estate planning assistance from experienced trust officers who understand client goals and can work with the client and his or her other professional advisors to match these goals to effective solutions
- Next generation planning in conjunction with your attorney or accountant
- Expertise of trust officers who understand the regulatory, legal and tax implications of trusts and estate planning
- Principal and income accounting; directed distributions and bill paying
- Complete estate administration services upon death, with Midwest Trust serving as trustee, co-trustee or personal representative

## Who Is Financial Counselors?

Established in 1966, Financial Counselors, Inc. (FCI) is a premier Registered Investment Advisor with more than 40 years experience managing equity and fixed income assets of institutions and high net worth individuals. FCI offers investment advisory services customizable to each client's specific needs.

FCI is the entity in MTC Holding Corporation dedicated to putting the client first while providing flexible and sophisticated strategies for investment management that leverage the expertise of FCI and that of other leading independent money managers.

## How Can FCI help you or your organization?

Consistent with our personalized approach to each client's needs, we offer access to the full spectrum of asset classes and investment styles.

- Customized solutions utilizing sophisticated research and analytical tools to construct individually managed portfolios
- Experienced portfolio managers provide consultative, relationship based investing with attention to policy requirements, risk tolerance, tax sensitivity and liquidity needs
- Expertise of portfolio managers who understand asset allocation and diversification developed through the application of advanced risk analytics. Tactical asset allocation weightings based on the current economic environment; monetary and fiscal policies; economic, social and demographic trends
- Provide access to additional alternative asset classes such as hedge funds, real estate assets, and commodities through exchange traded funds and mutual funds

## Who is Midwest Philanthropic & Institutional Services?

An LLC created under the MTC Holding Corporation dedicated to three distinct areas:

- Assisting individuals and their families in charitable strategies;
- Assisting not for profit organizations; and
- Providing consulting services for the institutional market place.

## How can Midwest Philanthropic & Institutional Services help you or your organization?

We provide expertise and services for your personal and corporate philanthropic strategies. These services include:

- Investment advisory services including asset allocation strategy development, with affiliate Financial Counselors, Inc.
- Administrative and fiduciary services, with affiliate Midwest Trust
- Philanthropic program design and implementation
- Investment policy statement assistance
- Private foundation board governance
- Grant techniques
- Next generation planning (in conjunction with your attorney, accountant, and fund raising consultant)
- Enabling charitable organizations to continue their good work and mission into the future
- Allowing individual tax-free or tax-advantaged accumulation of assets that will eventually go to one's favorite charity