



# NEWS

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Second Quarter 2023

## A NOD TO TRADITIONS

Each summer for 45 years, my family has visited Litchfield Beach, South Carolina. It's a tradition that started with my grandparents' generation and continued with my parents plus aunts, uncles and cousins. Today, the annual trips continue with spouses who have joined the family and new generations of children, including my parents' great grandchild.



**Daniel K. Carter**  
*President*

I hope that you and your loved ones can enjoy treasured traditions or fun opportunities as we move into the warm summer months. May it be a time of reduced stress when you can unwind a bit and take full advantage of what the summer has to offer.

The Trust Company of Tennessee teams will continue to work hard on your behalf to ensure that the goals you and your family have set are being achieved. If you have experienced life changes, need additional tools or simply want to check in to ensure that all the right pieces are in place, check out Chris Lambert's article in this newsletter and reach out today to connect with our experts.

We have so much to celebrate, including a full slate of community activities, accolades including receiving a Rocky Top Business Award, new faces and multiple employees who have reached milestone anniversaries with The Trust Company.

As we constantly strive to find ways to streamline processes, build service offerings and support our communities, our most central goal is to build trusting relationships and provide the best strategies for you to live confidently. I feel that it's our team's most important and lasting tradition.

Whether your summer tradition is sitting on the beach until sunset, floating on the lake, enjoying the great natural beauty of East Tennessee or any other activity that enriches your life, we hope that as you catch up on conversations with loved ones, you'll feel confident that we're working to help you reach your financial goals.

Thank you for allowing The Trust Company to serve you and your family. Please enjoy the summer ahead and contact me at [dcarter@thetrust.com](mailto:dcarter@thetrust.com) with any questions or comments.

## SUMMERTIME FINANCIAL CHECK-IN

Daniel's welcome letter talks about summertime traditions making our lives rich and full. My family loves our summer traditions of baseball tournaments and beach trips. I hope that you can enjoy treasured traditions this summer as well! We work diligently

each day to ensure that our clients have the tools and strategies in place so they can live well now and into the future.

>> *Continued inside*



**Chris Lambert**  
*Relationship Manager*



## EVENTS

### L'Amour du Vin

The highly anticipated food and wine event, L'Amour du Vin, was held March 2-4 at Blackberry Farm and Knoxville Museum of Art, with all funds raised supporting the KMA. The Trust Company of Tennessee was a Balthazar sponsor of the event.

### Symphony Ball

The Trust Company of Tennessee was proud to sponsor and attend the Knoxville Symphony League's Symphony Ball on March 25 at The Quarry Venue in support of the Knoxville Symphony Orchestra.



### Law Practice Today Expo

Knoxville Bar Association hosted the Law Practice Today Expo on March 30-31 at UT Conference Center, and The Trust Company was a sponsor and had a booth at the event, which focuses on the latest development in legal technology, law practice management and innovation.



### Hats in Bloom

Hats in Bloom was held on April 21, benefiting the Knoxville Botanical Garden. The grounds were filled with attendees in hats of all colors and sizes, and members of The Trust Company enjoyed this fun spring event.



### UT Gardens Gala

On April 28, attendees of the UT Gardens Gala celebrated 40 years of the gardens and honored Sharon Pryse, our CEO and founder, for her contributions to the UT Gardens and national conservation initiatives. The gala theme was "Conserving the Past, Sustaining the Future," and all proceeds benefit UT Gardens.



### Paralegal Seminar

The Tennessee Trial Lawyers Association 2023 Paralegal Seminar was held on April 28 in Franklin. The Trust Company was a food and beverage sponsor and had a booth at the event.

### Zoofari

The Trust Company was proud to be a presenting sponsor of Zoofari 2023 benefiting Zoo Knoxville. The event brings more than \$1 million to support the zoo's education, conservation and animal care programs.



### Wise Women

On May 3, The Trust Company continued its Wise Women series with a session in Knoxville on the topic of Social Security. Susan Williams, vice president and trust officer, led the session, and attendees brought questions and learned best practices for this important retirement benefit.

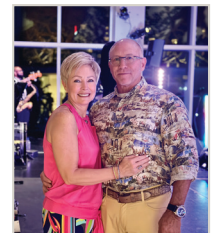
### Rocky Top Business Awards

Winners of the inaugural Rocky Top Business Awards were celebrated at an event on May 5 at the Knoxville Convention Center. The Trust Company was named among the fastest-growing University of Tennessee-Knoxville alumni-owned or alumni-led businesses.



### Kick-Off to Summer

Knoxville Museum of Art's Kick-Off to Summer event was held on May 12 at the museum. Attendees enjoyed the 12-piece "I Love This Band," and The Trust Company was a Grand Patron sponsor.



### Leadership Luncheon

The Trust Company was a partner sponsor for the 2023 Leadership Luncheon held May 17. The Leadership Knoxville Class of 2023 was presented and celebrated, including our own Senior Vice President Grant Boyd. CEO and Founder Sharon Pryse presented the Distinguished Alumni Award to Pastor Daryl Arnold.

### Chattanooga Lookouts

Members of the Chattanooga team, along with clients and friends enjoyed an evening of baseball with the Chattanooga Lookouts on May 18.

## Tie-Dye Day



Our Diversity and Culture Team held the second annual Tie-Dye Day on May 24 at the Knoxville office. Dozens of team members enjoyed a pizza lunch, then gathered outside to visit with colleagues and make tie-dye shirts. We value teambuilding opportunities, and this was a special acknowledgement of the second anniversary of the founding of our Diversity and Culture Team.

We look forward to future initiatives, events and educational opportunities brought by this very important team!

# Congratulations!



**Sharon J. Pryse**  
*CEO and Founder*

Kudos to CEO and Founder Sharon J. Pryse on being honored at the UT Gardens Gala for her contributions to the UT Gardens and national conservation initiatives.



**Stacy Roettger**  
*Chief Legal Officer*

Congratulations to Chief Legal Officer Stacy Roettger on being elected as a Fellow of the Tennessee Bar Association in the class of 2023.

Hats off to the entire Trust Company team on being named among the fastest-growing University of Tennessee-Knoxville alumni-owned or alumni-led businesses at the first annual Rocky Top Business Awards.

## SERVICE MILESTONES

We appreciate the dedication of our employees and want to recognize team members who are celebrating milestone anniversaries with The Trust Company of Tennessee this quarter.

25  
YEARS



**Teresa Miller**  
*Operations Officer  
Trade & Transfer Specialist*

15  
YEARS



**Tammie Thomas**  
*Client Service Associate*

10  
YEARS



**Lindsay Cates**  
*Vice President, Marketing*

5  
YEARS



**Grant Boyd**  
*Senior Vice President*

5  
YEARS



**Brittany Morgan**  
*Associate Relationship  
Manager*

5  
YEARS



**Zerconia Davis**  
*Customer Service Manager*

5  
YEARS



**Kathryn Waddell, JD**  
*Legal Counsel*

## >> **SUMMERTIME FINANCIAL CHECK-IN, continued**

Life brings different seasons, and if you and your family are experiencing changes – any parents of rising high school seniors just one year away from college? – or need to further develop a plan to help you reach your financial goals, we encourage you to do a financial check-in this summer. Our goal is to put the right pieces in place to help you feel secure, and as priorities change, we can help you reset the course and navigate through it.

### **CONSIDERATIONS FOR FINANCIAL PLANNING**

Through building personal relationships and intimately understanding your goals, we will work with you to consider all aspects of financial planning and build an individualized plan to help you reach them. Financial plans should be living documents, meaning they change over time as life changes.

Through Social Security analysis, tax planning, estate planning, college planning and retirement projections, as well as reviewing your current investments, our team can evaluate the pieces and set them up to work in concert. It may seem overwhelming, but rest assured our experts are equipped to organize, strategize, simplify and implement the right tools to help you live confidently.

If you ever question if your savings are properly invested, reach out to us and together we'll develop a long-term investment strategy to fit your needs.

### **TRUSTS AND ESTATE PLANNING**

Have you or your family experienced major life changes that could impact your estate planning? To achieve your desires to protect your loved ones, it is crucial to address your estate plans. Marriage, divorce, death of

a spouse, birth of a child or child reaching the age of majority can mean that adjustments such as updating beneficiary forms, retirement accounts and insurance policies may be necessary.

Our team also specializes in a wide range of trusts crafted to accomplish objectives such as reducing potential estate tax liability, avoiding probate, directing wealth distribution to heirs, protecting beneficiary wealth from creditors, providing tax-efficient gifts to charities and providing for needs in case of illness or incapacity. We will work with your legal and tax advisors to design and administer strategies to fulfill your long-term plans.

### **OPTIONS FOR BUSINESS OWNERS**

The Trust Company's corporate retirement plans offer bundled services for you and your employees, including investment selection and oversight, compliance, record keeping, customer service, plan design and employee advice.

Additionally, every business owner should have a business transition plan in place to maximize the benefits for both the owner and successor. Our business advisory services experts sort through the personal, financial, legal and tax implications of business transition to provide clarity for owners, future owners and employees.

We hope you'll do a summertime financial check-in and reach out soon to the experts at The Trust Company to discuss any changes or updates needed to help provide the freedom to live your life confidently. After all, helping our clients and their families is why we do what we do. Enjoy your summer!

## **OUR GROWING TEAM**



**Susan Weidknecht**  
*RPS Compliance  
Specialist*

Susan helps clients by ensuring accurate reporting and testing.



**Nona McKenzie**  
*Trust Operations  
Manager*

Nona is passionate about trust operations and is a keen problem solver.



**Bethany Headrick**  
*Business Analyst*

Bethany develops and implements efficiencies to improve internal processes.



**Sam Williams**  
*Customer Service  
Representative*

Sam helps clients through engagement and education.

# Staff Spotlight

## ANGELA COOPER, RECEPTIONIST

The first interaction that most people have with The Trust Company of Tennessee is with receptionist Angela Cooper. She is an ambassador, making positive first impressions and welcoming people she's seen once or 100 times with the same warmth and gusto.

"I'm happy to walk in each day," Angela shares. "I can make a difference in how people feel. Clients come to us with important business. I want to make them feel welcome and appreciated."

"We care about helping clients achieve their financial goals," Chief People Officer Lara Fleming says. "It starts the moment they walk in our doors and never ends. Angela's commitment to the client experience is demonstrated every day. She asks clients about their family, pets and hobbies. Her personal touch sets the stage for a great meeting with their client service team."

After four years in San Antonio, Angela wanted a new career upon moving back to Knoxville. She went to a staffing agency and started in the receptionist position as a temporary worker in May 2018. She was hired in November that year, and says, "I'm so glad I found The Trust Company and I feel lucky that I did!"

In addition to being the first point of contact for clients and employees, she is eager to assist where needed. She manages the conference rooms, keeps up with several calendars and helps plan and execute company events.



*"Each day is precious and, once spent, cannot be replaced."*

-COOPER FAMILY VISION

Before joining The Trust Company, Angela and her husband, Jeff, wrote their family vision, mission and values. "Our values aligned so well with the company. Sharon Pryse has created such an amazing culture here. She's such a great community leader who encourages employees to serve. Employees love being here, and clients feel comfortable and confident because of the expertise of our teams."

Lara shares, "I've learned that when you have a person in a role where they can be passionate every day, great things can happen. Angela has raised the level of service in greeting our clients and visitors." She also is known for making things more fun, and she is a community builder. She helped start an employee pickleball league and they play in the parking lot on Monday nights.

Angela earned a bachelor's degree in anthropology from Dickinson College and is the mother of two adult sons, Christopher and William. She and Jeff have two dogs, Mocha and Latte, and are avid travelers. She's currently brushing up on her German language and learning Italian for an upcoming trip to northern Italy. She also loves to read, kayak, cycle and paddle board.



## Join our team

We're looking for great people to join our team of wealth management, trust, estate administration and corporate retirement plan professionals who help our clients live confidently and achieve their goals. Visit [thetrust.com/careers](https://thetrust.com/careers) to learn more.



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# CONTINUING EDUCATION

For more information and to register, visit [thetrust.com/events](http://thetrust.com/events).



**July 25:** Opportunities and Obstacles  
Created by the Uniform Trust Code

**Sept. 19:** Gift and Estate Tax Black Holes

## Tastes of the season: S'MORES DIP

*If you want the goodness of s'mores without the hassle of fire, make this simple s'mores dip!*

*Image and recipe inspiration from [cleverlysimple.com](http://cleverlysimple.com)*



### Ingredients

3-5 standard-size Hershey's milk chocolate bars  
1 bag large marshmallows  
Graham crackers, pretzels or fresh fruit for dipping

### Instructions

Preheat oven to 400 degrees. Grease skillet or shallow pan and cover the bottom of the pan with the chocolate bars. Put the chocolate in the oven for about 3 minutes to start melting. Remove pan from oven and top with marshmallows, standing them on the flat side and covering the entire top in a single layer. Bake for 5-7 minutes or until the marshmallows are puffed and golden. Serve hot with dippers.

*We also hear that a certain group of elves who make Fudge Stripes cookies promote making s'mores with a roasted marshmallow sandwiched between two of their cookies. Please let us know if you've tried that method and if we should as well!*