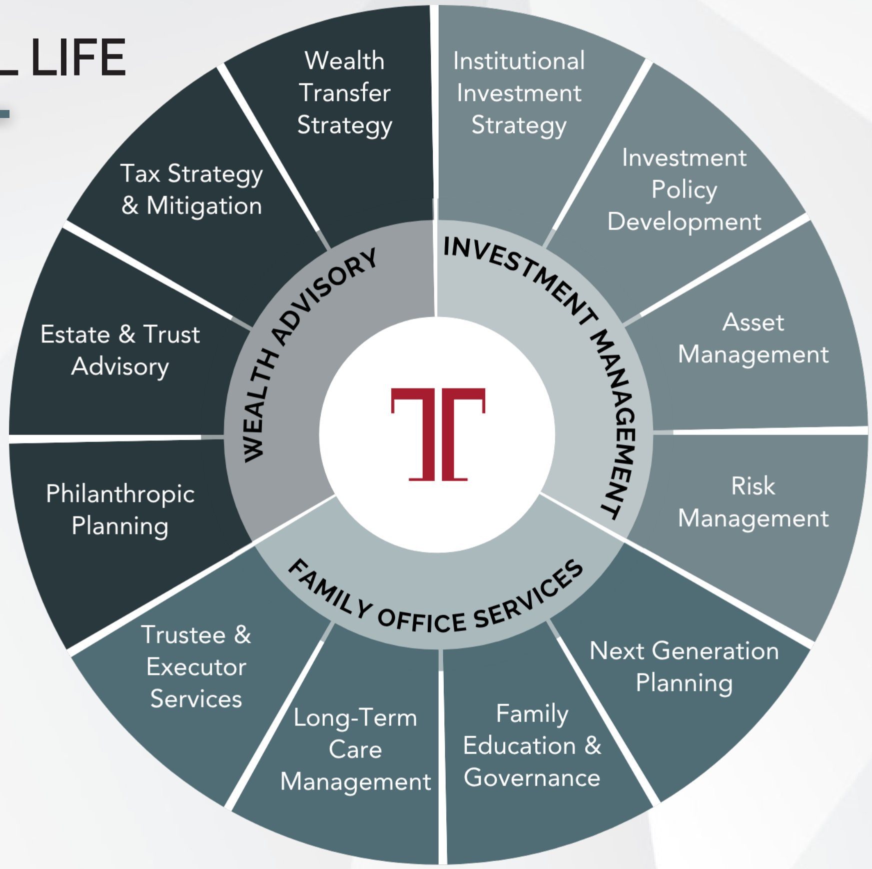
TRUXTON WEALTH

The Truxton Wealth team works with high-net-worth and ultra-high-net worth individuals, families, and business owners to help navigate life's complexities through thoughtful and strategic financial guidance.

MANAGING YOUR FINANCIAL LIFE

Every Truxton client experiences a personal, hands-on, comprehensive approach for managing their wealth and everything that it intersects: family, taxes, retirement, real property, insurance, trusts, estates, philanthropy, and more.

Truxton Wealth commits to provide its clients with a reduced risk profile, minimized tax burden, and, most importantly, a streamlined, holistic wealth plan. This integrated, all-inclusive formula represents the core of all of Truxton's corporate activities.



DEDICATED, MULTIDISCIPLINED TEAM

Our steadily growing team is deliberately organized to oversee fewer clients to ensure a greater level of attention and service for each of our client families, promoting deeper relationships that extend across generations.

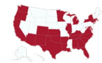
For each Wealth client, we bring you a curated team of specialists to support your day-to-day lifestyle needs and match your financial goals. Clients have access to a deep bench of wealth experts including credentialed financial planners and advisors (CFA®, CFP®, CTFA), tax specialists (CPA), and attorneys (JD).

30
wealth professionals

263
active client relationships

$6.7 MM
average client relationship

27 States
represented by client relationships



wealthmanagement@truxtontrust.com

615-515-1700

THE TRUXTON DIFFERENCE

Truxton Wealth clients benefit from an exhaustive and comprehensive look at your finances, goals, and aspirations with the ultimate goal of achieving your near- and long-term financial and legacy goals.

ASSESSMENT

Review the current situation

- Review wills and trusts
- Inventory all assets and allocations
- Review entities and ownership structures
- Review tax returns and life insurance
- Define family goals
- Identify unique circumstances
- Review complete balance sheet

OPPORTUNITY

Identify opportunities to improve outcomes

- Recommend opportunities for wealth planning
- Create an appropriate investment policy
- Ensure proper asset titling
- Plan succession and governance
- Create an investment implementation plan

OPTIMIZATION

Implement and reassess as factors change

- Collaborate with attorneys and CPAs
- Recognize new circumstances
- Provide consistent feedback
- Optimize income and tax liabilities
- Keep organized and thorough records
- Know the stakeholders and help them understand the plan

Truxton 2026 Corporate Profile

Truxton Trust Company is a full-service bank and trust company, founded in 2004, that helps clients achieve prosperity and peace of mind by providing distinctive, comprehensive financial solutions. Truxton's mission is to do the right thing every day for clients.

The highest level of personal service is provided to clients through a vastly experienced team of professionals who are experts in personal and commercial loans, depository accounts, comprehensive wealth management and capital advisory services.

Over the years, Truxton's distinctive, consultative approach with clients has made it one of the fastest growing wealth management firms and one of the safest banks in the country.

TRUXTON AT-A-GLANCE

- Founded in 2004
- OTCID: TRUX
- 92 employees
- Headquartered in Nashville, TN with a wealth management office in Athens, GA
- Recognized by American Banker for thirteen straight years as a top bank, measured by ROAE
- Ranked 7th Top U.S. community Bank nationally by American Banker in 2025

$1.2 B
bank assets

$2.0 B
assets under management

20.5%
return on average equity

1.89%
return on average assets

41%
revenue derived from managing families' wealth