

Naming First Covenant Trust in Your Documents



ABOUT FIRST COVENANT TRUST

First Covenant Trust & Advisors is an independent trust company, chartered in South Dakota with trust service offices in South Dakota, Tennessee, and North Carolina. Over and above these situs advantages, First Covenant Trust prides itself on being service-oriented, flexible, advisor-friendly and attempts to take care of families and beneficiaries in a way we all would want our families taken care of.

SHARE WITH YOUR ESTATE PLANNING ATTORNEY

To name us in your documents, share this recommended language with your estate planning attorney:

First Covenant Trust & Advisors, LLC, a South Dakota chartered trust company with an office currently located at [Insert Office Address*].

**Please use the appropriate address corresponding with your trust's situs. If your trust is not a SD, TN or NC trust, use First Covenant's South Dakota office address.*

SOUTH DAKOTA

315 N. Main Avenue, Suite 305
Sioux Falls, SD 57104

TENNESSEE

801C Sunset Drive, Suite 100
Johnson City, TN 37604

NORTH CAROLINA

419 Second Street NW, Suite 100
Hickory, NC 28601

DOCUMENTS THAT FIRST COVENANT TRUST CAN BE NAMED IN

- **Trustee, Co-Trustee or Successor Trustee of a Trust** (any jurisdiction)
 - This is the most common role we serve in.
- **Executor under Last Will** (TN/NC/SD)
- **Agent under Power of Attorney** (TN/NC/SD)
 - This is sometimes called an Attorney-in-Fact.
- **Conservator of the Estate** (TN/NC/SD)
 - This is sometimes called conservator of the purse, or of the assets.
- **Agent for Fiduciary**
 - We can provide back-office support to individuals serving in any of the above roles.



DRAFTING SUPPORT

For questions or support in the legal document drafting process, please contact First Covenant Trust's in-house counsel, David Greene, JD, CPA, via info@covenanttrustllc.com



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