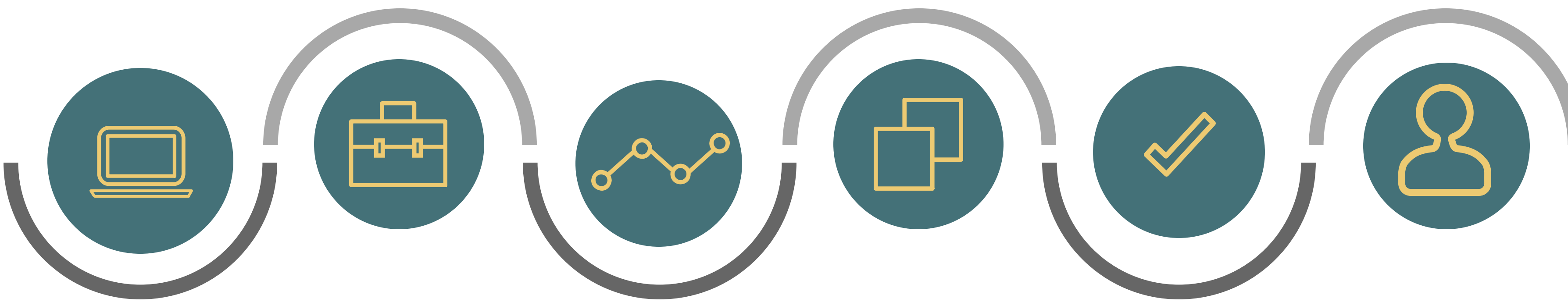
Investment Process

A Step-by-Step Overview

ATG TRUST
COMPANY



Information Gathering

ATG Trust works with the client to obtain the necessary information to build out an investment risk profile.

Investment Objective & Asset Allocation Strategy

Utilizing the risk profile, terms of the governing document, goals, and time horizon, we determine appropriate strategies.

Investment Vehicles

We use non-proprietary mutual funds and ETFs. Institutional share classes are utilized. When appropriate for tax efficiency purposes, individual securities are used.

Investment Policy Statement

This outlines our fiduciary duties, responsibilities, and policies to our clients.

Ongoing Monitoring

We perform ongoing due diligence of our approved investments and tactical and strategic asset allocation strategies.

Ongoing Client Reviews

We meet with clients to review the portfolio and current circumstances to make sure the investment objective and asset allocation are in line with the client goals.