

## Our Trust Promise

Santa Fe Trust provides independent, professional trust services for cemetery and funeral funds with integrity and safety.

Santa Fe Trust's Cemetery Trust Advisory Board is a group of highly regarded industry professionals.

Santa Fe Trust will provide fiduciary oversight, administration and compliance services with innovative solutions that give you a competitive edge in today's changing business environment.

Your clients will have the comfort of knowing that their investments in your services are protected by an independent corporate trustee.



## Santa Fe Trust Cemetery and Funeral Trust Services



Santa Fe Trust, Inc.  
P.O. Box 22790  
Santa Fe, NM 87502  
505-984-2700  
888-984-2775  
cemeterytrust@santafetrust.com

[www.santafetrust.com](http://www.santafetrust.com)



## Cemetery and Funeral Trust Services



# Why Choose Santa Fe Trust as your Trustee?



## » *Changing Times*

The death care industry is changing rapidly. Some states now require cemetery and funeral pre-need trusts to be administered by an unaffiliated trustee. Finding a qualified trustee who understands these unique needs can be challenging. Santa Fe Trust is an unaffiliated, independent trustee that understands and fills these requirements.

## » *Santa Fe Trust's Unique Approach*

Since 1997, Santa Fe Trust has been an independent trust company. This sets us apart. In an industry with regulatory and legislative uncertainty, it enables us to respond more quickly and adapt sooner than many other trust services providers as market and regulatory changes occur.

## » *Santa Fe Trust – Cemetery and Funeral Trust Specialists*

As an independent trustee, Santa Fe Trust's Cemetery and Funeral Trust Advisory Board brings a team of experts offering solutions in administration, investment, accounting, state reporting and tax filings for cemetery and funeral trusts. If you are performing one of these functions, we can cooperatively "fill in the gaps" as needed. Santa Fe Trust manages administration and compliance, so you can use your company's time and energy in more productive ways.



## » *Reliable Objective Service*

As a Trustee, Santa Fe Trust meets the emerging requirements for independent oversight. Santa Fe Trust's Trustee services provide integrity and transparency that give you, your regulators and your clients assurance that fiduciary oversight, administration and compliance are provided today and for years to come.

## » *Security and Protection*

Santa Fe Trust is held to the highest standards of fiduciary care. The Financial Institutions Division of the State of New Mexico audits Santa Fe Trust annually. Santa Fe Trust provides fidelity bonding for our employees and general liability coverage to protect trust assets in our care. The Cemetery and Funeral Trust Advisory Board and a national CPA firm provide ongoing review of our business practices.



## » *Peace of Mind*

Choosing Santa Fe Trust, an experienced, uniquely qualified Corporate Trustee with integrity and adaptability, shows the highest standards of care for your cemetery and funeral trust needs. You can assure your clients that their end-of-life plans are administered by an independent, professionally managed trust. Santa Fe Trust provides the answer to your regulatory and marketing needs.

**Santa Fe Trust**  
TRUST INDEPENDENCE®