

Spinnaker Trust 2017 Upgrade

- Spinnaker Trust is converting to a new Trust Accounting platform effective July 1, 2017.
 - ***That means your statements and online portal are getting an upgrade!***
- We will send you a final statement from the old trust accounting system covering the period January 1, 2017 to June 30, 2017 via your usual delivery method.
 - ***We encourage you to keep this statement in your files, either paper or electronic.***
- You will have access to your current online statements through July 31, 2017.
 - ***After June 30, 2017 your account activity will be on the new system.***
- In mid-June, we will provide you with new online access instructions.
 - ***A new password! We know how much you love that!***
- The new online portal will have historical data dating back to January 1, 2015.
 - ***We are happy to help with any historical research needs that pre-date January 2015.***

As part of this transition we will have a new custodian, U.S. Bank. Please ask us for updated delivery instructions if you are sending assets to your account at Spinnaker.

We are certain that this upgrade will provide an even better client experience for you and we are working hard to ensure a smooth transition.

Please call us with any questions.

Thank you from everyone at Spinnaker Trust!