investor.com

Everence Trust Company

TRUST SCORE

85%

Everence Trust Company, federally registered in 2001, is a Registered Investment Advisor (RIA) in 25 state(s) with a licensed staff of 59 advisors. Everence Trust Company manages $2 billion and provides investment advisory services for 3,919 clients (1:67 advisor/client ratio).

Everence Trust Company requires a $50,000 minimum investment and charges a blended rate 1.50% and below (negotiable) for ongoing portfolio management services, depending on the size of the portfolio.

BENEFITS

Firm uses a transparent fee-only model

Firm has $1B or more in assets under management

Firm services over 1,000 clients

Communications sent to the firm's website are secure and encrypted

Firm does not have a disciplinary history

Firm does not have any misdemeanor convictions

Firm does not have any felony convictions

Firm does not have an attorney conflict

Firm does not accept performance-based fees

Firm does not perform side-by-side management

Firm does not receive soft dollar benefits

CONSIDERATIONS

There is only one licensed advisor for every 67 clients (industry average 1:50)

Firm has been federally registered for only 17 years

Firm actively engages in insurance sales and may be incentivized to insure clients with products that generate high sales commissions when lower cost alternatives may exist

Firm privately manages or owns some of the products they recommend and may be incentivized to sell those products over others to their investors

Firm may recommend proprietary investments and products that generate larger commissions than other similar non-proprietary products

BENEFITS (cont.)

CONSIDERATIONS (cont.)

Custodian is unknown