



**CHRISTIANATrust**  
A DIVISION OF WSFS BANK

## ***An Invitation***

*We extend an invitation to you to join the other individuals, families, financial advisors, businesses, and institutions who have found Christiana Trust to be a firm uniquely responsive to client needs. Whether you are interested in personal trusts, corporate trusts or other asset management services, the professionals at Christiana Trust would be happy to show how you can reach your goals and meet your strategic objectives.*

## CHRISTIANA TRUST - WHO WE ARE

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From our beginning, Christiana Trust has been dedicated to providing exceptional personal service and professional assistance to individuals, families, and corporate and institutional clients. Christiana Trust has built a worldwide reputation for administering and servicing a wide range of corporate trust issues. These issues range from TIA corporate debt, trust-originated preferred securities, asset-backed and specialized securitizations, voting and collateral trusts, municipal debt issues and a variety of escrow and agency appointments.

When you work with us, you secure the advantages of our:

- *Extensive Experience*
- *Exceptional Service*
- *Team Approach*
- *Complete Attention*

## THE BENEFITS OF OUR CORPORATE TRUST & AGENCY SERVICES

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**Providing superior client service and focusing on the details of your transaction is our primary concern.**

At Christiana Trust we work closely with our clients. We focus on your particular needs providing solutions to the many complexities that face an issuer in the corporate trust marketplace today. Our client base includes major corporations, prominent banks, transportation companies and financial service companies.

Christiana Trust offers a comprehensive list of corporate trust services. Our corporate trust professionals have proven themselves and have demonstrated the experience to handle any type of complex transaction. Whether you are a local, regional, national or international organization, we deliver the specialized service and expertise in a single place to facilitate and implement your transaction.

## OUR EXTENSIVE EXPERIENCE INCLUDES:

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### **Indenture Trustee**

Christiana Trust will administer the bond issues as directed by the trust indenture and the structure and mechanics of the bond financing, including terms, conditions, restrictions, investments, default, remedies, covenants and disclosure requirements.

### **Successor Trustee**

Christiana Trust may replace a current trustee at the request of the issuer/borrower when there are service issues or when a conflict arises.

### **Paying Agent**

In accordance with payment schedules, Christiana Trust will make all periodic payments of interest and principal on certificated and/or book-entry bonds.

### **Escrow Agent**

Christiana Trust will act as a neutral third party to hold and disburse funds or other property based on terms detailed in the governing document.

- *Bankruptcy*
- *Merger and Acquisition*
- *Class Action/Litigation*
- *Structured Settlement*
- *Governmental/Environmental Protection*
- *Indemnification*
- *Construction/Contractor Retention*
- *Software Licensing/Source Code*
- *Real Estate Purchase and Sale/1031 Exchange*
- *Personal Property/1031 Exchange*
- *Insurance Company Deposits*
- *Private Placements/Subscriptions*
- *Business Escrows*

### **Owner Trustee**

Christiana Trust will hold title to trust asset(s), issue certificates of beneficial ownership, and issue notes to the investors/lenders. We will also forward notices to designated parties, work in conjunction with the servicing agent and act upon direction of the beneficial owner.

### **Delaware Statutory Trust**

Christiana Trust facilitates many transactions utilizing the Delaware Statutory Trust Act (DST). A DST is the preferred form of trust arrangement for asset-backed securitizations, trust preferred securities, collateral trusts and liquidating trusts. Also, our Wilmington, Delaware office provides custody services for Delaware investment holding companies.

### **Registrar and Transfer Agent**

Christiana Trust will verify that only the authorized numbers of bonds are issued. We will maintain records of the registered debt-holders.

### **Investment Agent**

Christiana Trust will invest funds within stated guidelines or according to cash flow requirements.

### **Independent Director, Manager and Special Member Services for SPV's**

Christiana Trust can provide an independent director or a manager should your transaction require one.

## OTHER SERVICES PROVIDED

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- *Common Law Trusts*
- *Liquidating Trusts*
- *Insurance Trusts*
- *LLC Services*
- *Trust Preferred Securities*
- *Public Finance Transactions*
- *Collateral Agent*
- *Custody Investment/Services*
- *Document Custodian*
- *Voting Trusts*
- *Dissemination Agent*
- *Tender Agent*
- *Master Trusts*
- *Fiscal Agent*

## THE BENEFITS OF WORKING WITH CHRISTIANA TRUST

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### **Depth of Experience:**

When it comes to administering complex corporate trust issues, there's no substitute for experience. Our trust professionals have that experience – in abundance. With experience ranging from 10 – 30 years our team members have the specialized knowledge necessary to ensure that your corporate trust issue will be handled with great care and attention to detail.

### **A Superlative Level of Service:**

Our corporate culture always places the interests of our clients first. Our trust professionals are committed to meeting each of our client's needs efficiently and proactively.

### **A Focus on the Important Issues:**

Our work and development on corporate trust accounts is very important to our firm. Corporate Trust is not a sideline. It is a large component of our overall business mix. That's one reason we seek out and hire the best professionals in the field.

### **Our Team Approach:**

Our multidisciplinary team of professionals works closely with each issuer's legal and financial advisors to ensure that all closings and each transaction is handled smoothly and efficiently.