The Trust Company of Virginia

Meet Our Investment Team

Partnership – a cooperative relationship between people or groups who agree to share responsibility for achieving some specific goal.

One of the core values of The Trust Company of Virginia is what we call *"The Art of Partnership."* Focused exclusively on wealth management and guided solely by our one-on-one client centered approach, one of our major strengths is the close relationship we maintain with each client. Our prime objective is to know the client well, to discover what the client expects and to help articulate a family vision. A well-defined investment strategy is critical to realizing this vision. Nowhere is this "art of partnership" more evident than in the investment department's relationship with the client, with the administrative team and internally with each other.

Andrew Bolyard, our Chief Investment Officer, brings a competitive athlete's perspective to investing. A former professional racquet ball player, Andrew grew up in Hershey, Pennsylvania where his parents were "house parents" at the Milton Hershey School, a cost-free, private, residential school and home for children from lower income families, funded by the Milton Hershey trust. Andrew says, "Growing up in this environment gave me a real sense of the importance of giving back, and co-incidentally, the enormous benefit of growing a trust fund's investment portfolio." Andrew and his wife, Alli, have two active boys, Alex age 3 and Anderson age 6, and relish juggling two careers and their family life. Andrew's responsibilities include leading the investment group, working closely with the administrative team in managing clients' portfolios, and he is also in charge of our Growth equity strategy. His 15+ years of experience in the finance industry give him a strong basis for leading the investment team's efforts – a role in which he thrives on the shared responsibility for helping both our company and our clients achieve their goals.

Left to right: Andrew Bolyard, Barton Peters, Heather Voight, and Ashton Long.

Barton Peters, who has been with The Trust Company for 10 years, is responsible for our Value equity strategy in addition to his client portfolio management responsibilities. Barton grew up in Richmond, oddly enough within a mile of our office, and said that, "In the ninth grade, I realized I was not going to be a star athlete, and the value I could bring to the team was to help devise strategy on the field." He is still helping devise strategies for The Trust Company, his clients and his family. Barton and his wife started dating when they were thirteen, and raised two daughters, both of whom are working on master's degrees in family counseling. Barton has been in the investment field for his entire working life, and brings a passion to what he calls "the game of investing." Like Andrew, he derives enormous satisfaction from taking care of the clients' money so they can achieve their financial goals.

Investment Team ~ continued

Heather Voight joined The Trust Company in 2008, and since joining the company earned her MBA at VCU, got married and now has Holden, a fourteen month old toddler. Athletics were an important part of Heather's youth, and she still enjoys tennis, skiing and softball when time allows. Heather wears a number of hats at The Trust Company, executing equity and bond trades, managing the core strategy equity portfolio and managing fixed income positions. She thoroughly enjoys being part of the investment team, partnering with the administration group and interacting with clients.

The newest member of the investment team is Ashton Long, who joined the group in March of this year. After college Ashton worked for Morgan Stanley as a client service administrator, tried her hand at direct sales for an office equipment company for a couple of years before returning to investments with The Trust Company. She and her husband are enjoying life as newlyweds in the Fan. Ashton will support the whole investment group, and is training under Heather at the present. She said, "I am excited to be here because my goal is to learn all I can about investments and I am learning something new every day." These four investment professionals collectively and singly provide an unparalleled level of service distinguished by their passion for their craft and by the strength of their relationships with each other, with administration and with their clients. They take great pride in having developed a disciplined investment approach and adhering to that discipline but they never lose sight of the importance of individualizing their approach to each client's unique circumstances. They take the time to know and understand each client's situation, whether taking into account tax considerations when selling securities, or helping to fund a grandchild's education. The investment team works in close partnership with the administrative team, and together they work toward building an enduring and deep relationship with both the client and with the client's family.

This is to us, the Art of Partnership.

Our Williamsburg Office

For a small Virginia town, Williamsburg is unique.

With impeccable historic roots, Williamsburg was founded in 1632 as a fortified settlement on high ground between the James and York rivers. Along with nearby Jamestown and Yorktown, today it forms part of the Historic Triangle, attracting several million tourists a year. William and Mary, the second oldest college in the US, is the cultural center of the town. In addition to its historical and cultural attractions, Williamsburg's proximity to the Chesapeake Bay and the Atlantic beaches, its temperate climate, and its great restaurants have made the town a magnet for retirees.

It was these factors and a personal relationship that prompted The Trust Company to open an office here in 1997. At that time, Carl Burgdorf was in a big-bank trust department in the Hampton Roads area. Carl had worked with our company founders at the old First & Merchants bank, and they recruited him to start our Williamsburg office. Carl immediately hired Jodi Szvetecz, who is still with us today, and they set out to get to know all those retirees. Starting an office de novo was not without its difficulties, but Carl and Jodi were soon off and running. They enjoyed the respect of their colleagues and their clients, as Jodi said, "I enjoy getting to know and love our clients as if they were family – it is not only the most exciting part of my job but the most important." Carl retired in 2001, and Don Murfee joined the Company to head up our Williamsburg office. Don had been head of the Personal Trust department at Wachovia Bank, and like Carl came to us through a personal relationship. He had worked with Sam Jenkins at a prior bank job, and Sam, one of the first Trust Company employees, and contacted Don about this position. The timing was ideal as Don was

Don Murfee and Scott Garber

happy to leave the bureaucracy of a big bank and as he said, "Get back to my first love – client relationships." Don is still with The Trust Company, although he is now devoting himself exclusively to developing new business. In the 14 years since he moved to Williamsburg, Don has thrown himself into community affairs, serving on the Virginia Symphony Board, the Williamsburg Hospice Board, and is very active in the 1607 Society, lead supporters of Jamestown Settlement and Yorktown Victory Center museum programs. His community service and his prowess on the golf course make him ideal for his new responsibilities.

Scott Garber, who now heads up the Williamsburg office, came to The Trust Company in 2003 after stints with large banking organizations in New York and New England. Another avid golfer, Scott and his wife moved to Ford's Colony twelve years ago with their two daughters, who are now both in college. When asked what he does in his spare time, he said, "Write college tuition checks." Scott began his trust career in 1986 and when asked what he enjoys the most about this business, he said, "Working with clients to address their financial concerns in an attempt to provide them peace of mind and financial independence."

Scott and Jodi now run a highly successful branch office with Don working hard to enhance that success. Scott's leadership abilities are well known internally, and he recently assumed management responsibility for our McLean office as well as Williamsburg. Jodi, one of our veteran associates, provides training and backup for new associates in all our offices. She cheerfully handles these additional responsibilities without discernable impact on her day-to-day responsibilities. But whatever additional responsibilities they undertake, their first priority remains their Williamsburg client base, a loyal and sophisticated group who often refer friends to our Company.

All and all – a great partnership!

Scott Garber and Jodi Szvetecz

Events around the Company

Donna Chapman welcoming our Spring Forum guests.

Every spring we have a number of Forums, usually luncheons, where we bring in speakers whom we hope will inform or amuse our clients in each of our locations. Renee Norman, author of *A Million Tiny Things, My Experience in Caregiving*, gave touching and practical talks in Richmond and in Williamsburg about all the myriad details involved in caring for a loved one with a critical illness. Tulane Patterson gave an engaging talk in Lynchburg about the all ramifications of living longer and how important planning is in ensuring a financially stable and healthy life - even if one lives to be 100 or older.

Roanoke College Professor Paul Hanstedt, author of *Hong Konged*, gave a fun talk on the "agonies and ecstasies" of travel at the Shenandoah Club in Roanoke. Three representatives from Freeman's Auction house gave a fun program on antique and jewelry appraisals in Northern Virginia.

Speaker Renee Norman (center) with Paige Bartholomew and Dick Gates

In addition to our Spring Forums, we also sponsored the opening reception for the Annual Advanced Estate Planning and Administration Seminar in Williamsburg, marking the 21st year we have sponsored this reception. Finally, May 6 was the date of our annual Richmond client event, this year held at Lewis Ginter Botanical Gardens. Bill Lohmann and Bob Brown, told antidotes from their travels across Virginia in working on their book, *Backroads, People, Places and Pies from around Virginia.*

Richmond Spring Forum

Williamsburg Forum guests with Don Murfee

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