

Why choose the NeFDA Master Trust?

Managing and monitoring preneed fund growth and earnings is tough, especially in today's investment environment. Expert oversight of preneed funds helps optimize income while remaining compliant with complex regulations. Both require vigilance for which you may not have time or resource.

The NeFDA Board of Directors understands the challenges its members face in preneed fund administration and investment management. The Board selected AFCTS, a division of The Essential Planning Group, to develop and administer the NeFDA Master Trust.

We've made it easy to roll over your funds from existing programs to the NeFDA Master Trust, so you can focus on serving your clients while we focus on your preneed trust funds and administration.

The NeFDA Master Trust is a professional and comprehensive benefit to its members.

COMPLETE TURNKEY OPERATION FOR AN ALL-INCLUSIVE FEE – Our competitive fee, paid out of trust income, includes everything, from trustee and investment management fees to administrative expenses such as contracts, forms, promotional brochures, postage-paid envelopes, toll-free telephone and fax numbers, and easy access to our client services team.

INSTANT PAYMENT OF PRENEED DEATH CLAIMS

– We do away with claim forms and payments by mail. With one phone call, we provide you authorization to issue yourself payment from checks provided as part of your NeFDA Master Trust membership.

INSTALLMENT BILLING AND PAYMENT SERVICE – Our billing options enable consumers to pay for their prearrangements over time, including automatic payment withdrawal from checking or savings accounts and monthly billing for installment payments by mail.

HIGHLY COMPETITIVE RETURNS – Pinnacle Bank, trustee and investment manager, invests your preneed funds based on approved guidelines which focus's on preserving principle while achieving competitive returns.

SIMPLE ROLLOVER PROCEDURES – It's easy to move from your present preneed arrangements to the NeFDA Master Trust. We can assist with the forms and processes needed for smooth, timely funds transfer.

ONLINE REPORTS & STATEMENT OF ACCOUNTS – Every month we provide comprehensive information to keep you abreast of the status of your funds.

COMPLIANCE & REGULATORY ALERTS – Our full-time compliance manager ensures adherence to Nebraska regulations, legislation, and procedural changes.

**FOR MORE INFORMATION AND TO START WRITING NEFDA MASTER TRUST CONTACT :
AFCTS, YOUR TRUST ADMINISTRATOR AT:**

800-769-9363

INFO@AFCTS.COM



ESTABLISHED 1993