



CAREMOR CEMETERY TRUST

Pre-Need Cemetery Trust Services Provided By:

UMB Bank, Trustee handles the trust oversight, accounting, and administration for the Trust. The Trustee administers the accounts for pre-need contracts, including the Cares Act contract transactions. UMB as Trustee is also responsible for any new accounts and additions, death claims and fund disbursements.

- UMB Senior VP/CT Regional Manager Melissa Stover (515-368-6062)
- UMB VP/CT Relationship Manager Diana Van Vleet (515-368-6063)
- UMB CT/Sr. Associate Relationship Manager Natalie Lawless (515-368-6065)

Diana and Natalie are responsible for the day-to-day administration and accounting. They are your contacts for the Trust to set up new accounts or additions, handling disbursements, and any other questions or assistance you may need. Feel free to call Diana and Natalie for all your needs. Please fax or email account documents for account disbursements.

- Email Address caremor@umb.com
- Fax Number 515-368-6070
- Mailing Address UMB Bank, NA
7155 Lake Drive, Suite 120
West Des Moines, Iowa 50266

Benchmark Investment Advisors are the investment advisors for the Cemetery Trust. Benchmark offers a full range of exceptional financial services for the Cemeteries and your business.

- John Swift, CFA®, CPA, who is the Chief Investment Officer and Financial Advisor for the Caremor Cemetery Trust, advises the Trustee and communicates with Cemeteries and owners regarding investments.
 - Phone Number 312-259-9595
 - Email Address jswift@trustbenchmark.com
- Tim Vance is the face-to-face contact for Caremor Cemetery Trust. Questions regarding transferring accounts to Caremor or how to establish your facility with Caremor can be directed to Tim.
 - Phone Number 630-217-7976
 - Email Address tvance@trustbenchmark.com