FUTURA FUNERAL TRUST INVESTMENT SUMMARY

Trustee: Fiduciary Partners Trust Company
Phone: 855-408-9285

Chief Investment Officer and Financial Advisor for Futura Funeral Trust:
Benchmark Investment Advisors
John Swift, CFA®, CPA
Phone: 312-259-9595
jswift@trustbenchmark.com

Custodian: National Financial Services LLC (NFS), a division of Fidelity Investments

Overview

- The Trustee oversees and is the primary administrator for the Trust funds and has delegated the investment and custodial function to the Financial Advisor.
- The Financial Advisor recommends the objective, risk tolerance, and asset allocation for the Trust funds on an ongoing basis. The Financial Advisor also manages the Trust funds consistent with the Illinois Prudent Investor Rule pursuant to the established objective and risk tolerance.

Investment Objective and Risk Tolerance

The portfolio will be managed to a Conservative risk/return profile which is generally appropriate for investors seeking capital preservation as a primary goal and wishing to limit or avoid downside risk.

Asset Allocation

Broad asset class exposures will be allowed to be taken in the following ranges:

- Fixed Income: 70%
- Equity: 30%

Risk Disclosure

The Trust funds will be invested in equity and fixed-income securities and their value will be affected by securities market movements, which involve the risk of loss. There is no guarantee of return of full principal or minimum performance and there is no FDIC insurance. The Trust funds may lose value.