

# Advocacy Trust Expands Board of Managers with Seasoned Industry Professionals

*Advocacy Trust Welcomes Industry Veterans to Enhance Client Care Standards*

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Advocacy Trust (AT) is thrilled to announce the growth and expansion of its Board of Managers with the addition of Mrs. Leslie Coyle, CTFA, CFP®, Mr. Rob Ragsdale, CFP®, AIF, and Mr. Steven Stewart. With a combined industry experience exceeding 60 years in trust and financial services, these esteemed individuals strengthen AT's commitment to excellence.



AT is a Tennessee chartered trust company with reciprocity in many states throughout the country, enabling the company and its team to provide the absolute best care and services to beneficiaries nationwide. With over \$1B in assets under administration, AT specializes in enhancing the lives of clients, families, and caregivers through investment, trust, tax, and fiduciary services. This commitment and dedication is further strengthened and enhanced by AT's extensive team of professionals, ensuring round-the-clock client support. The expansion of the Board of Managers is a pivotal step in AT's ongoing mission to deliver unparalleled care to clients both present and future.

Kate Maloney, President of AT, expressed her enthusiasm for the new appointments, stating, "I am thrilled to have Leslie Coyle, Steve Stewart, and Rob Ragsdale join our Board of Managers. They bring a wealth of knowledge to us that will be invaluable as we continue to grow the company. We look forward to their insight and support towards our mission to provide best-in-class trust services to the individuals and families we work with." Coyle, Stewart, and Ragsdale join forces with current AT Board of Managers members: Mr. Jay Butler, CEO of AT, Mr. Spooner Phillips, Founder and CEO of The Forge Companies (TFC), Mr. David Paventi, COO of TFC, Mrs. Beth Allen, Chief Marketing and Relationship Officer of TFC, and Mr. Sean Coleman, Managing Director at Bay Point Advisors, LLC.

"Advocacy Trust, with our focus on clients living with special circumstances, strives to set the standard for their needs with empathy and professionalism. Adding Rob, Steven, and Leslie to the board gives us a wide base of expertise to leverage to ensure we always provide world class

financial, medical and general life care needs” states AT CEO, Jay Butler.

#### About Advocacy Trust

Advocacy Trust offers a comprehensive suite of services including special needs trusts, settlement trusts, asset protection trusts, minors trust planning, and fiduciary and administrative services. As part of The Forge Companies, Advocacy Trust is committed to providing tailored solutions to meet the unique needs of its clients.

#### About The Forge Companies

The Forge Companies focus on guiding plaintiff attorneys and their clients through the entire settlement planning process. To make this process more inclusive, they established an investment management firm, Advocacy Wealth Management, to complement existing annuity planning services and a trust company, Advocacy Trust, offering a full range of traditional and special needs trust services.

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