



IT'S ALL ABOUT FAMILY

INTRODUCTION

Meritus Trust Company Limited (“Meritus”) was formed in 2010 with one simple mission – to provide unparalleled fiduciary services to select families, predicated on independence, experience, and excellence.

With a vision of becoming the world’s pre-eminent TRUSTed advisor. Meritus prides itself on its relationship focus, pursuit of excellence and commitment to conducting all business with integrity.

ADVANTAGES OF BEING INDEPENDENT:

Recognized as an exceptional independent trustee. Meritus takes a holistic approach to trusteeship, going above and beyond by easing burdens and safeguarding capital for the people that matter most. Your family.

We are first and foremost a trust company, completely independent of banks, investment managers, legal and accounting firms or other institutions. We are able to provide fiduciary services completely free from any real or perceived conflict of interest.

Our independence allows us flexibility and the opportunity to leverage our extensive network of professional advisors and specialized firms to provide our families with global leaders in legal, accounting and other essential services on a completely transparent basis.

CORE SERVICES

- TRUST AND FIDUCIARY SERVICES
- PRIVATE TRUST COMPANIES
- COMPANY ADMINISTRATION SERVICES
- FAMILY OFFICE SERVICES
- CHARITABLE TRUSTS (PHILANTHROPY SERVICES)
- EDUCATION AND GOVERNANCE
- CORPORATE TRUST SERVICES
- DIRECTORSHIPS
- PROTECTORSHIPS

STEP

Winner

Independent Trust
Company of the Year

10th Annual
STEP PRIVATE CLIENT
AWARDS
2015 | 16

SENIOR EXECUTIVE TEAM:



MICHELLE L. WOLFE, CPA CA MANAGING DIRECTOR

Michelle is a founding partner of Meritus and has over 25 years trust industry experience. Prior to starting Meritus, Michelle was Managing Director of Rothschild Trust, Coutts and Butterfield Trust. She has been recognized by a number of international publications including, Who's Who Legal - Private Client Trust and Advisory Services 2015 and City Wealth's Power Women Top 200 List 2014, 2015 and 2016.

She has spent her career working with multi-jurisdictional multi-generational families establishing and administering charitable trusts, Bermuda Purpose Trusts and Private Trust Companies. Michelle holds a Masters in Business and Human Resources, is the past President of the Bermuda Association of Licensed Trustees (BALT), past Director on the Barrister and Accountants AML/ATF Board, a member of Bermuda Business Development Association (BBDA Trust Focus Group), and also holds memberships with CPA Canada and CPA Bermuda.

ALLAN WIEKENKAMP, CPA CA TEP, CFP CFO AND COO

Allan is a founding partner of Meritus who has over 17 years of experience in the offshore trust and investment industry. During this time he has developed extensive experience in tailored wealth reporting for complex family structures and the investment products common to the private clients industry. Allan was previously the Managing Director (and founder) of FORS (Family Office Reporting Services), a provider of accounting and investment reporting services to UHNW clients throughout the world. Allan is a member of CPA Canada, CPA Bermuda, STEP and is registered with the Financial Planning Standards Council of Canada.

SARA SCHROTER ROSS, LLB, DIP. IOD GENERAL COUNSEL

Sara has a wide range of legal experience in the banking, regulatory, corporate governance, commercial, corporate and litigation areas. Prior to joining Meritus, Sara was General Counsel and a member of the Executive Team at Bermuda Commercial Bank. Prior to BCB she spent 3 years as in-house counsel with AXA UK plc. Sara holds a Bachelor of Law and a Diploma in Legal Practice and was called to the Bermuda Bar in 2005. She is a member of the Bermuda Bar Association,

STEP and the Institute of Directors, and sits on a number of Boards and committees including the BHS Board of Trustees, the Bermuda IOD Executive Committee.

BARBARA J PATTERSON, BSC., TEP SENIOR FIDUCIARY DIRECTOR

Barbara is a founding partner of Meritus and has helped build the team and the organization over the last 8 years. She is a former Director of Bermuda Trust Company Ltd, and Fiduciary Director I Manager of the Private Family Office Team at HSBC Private Bank in Bermuda. Barbara began her career with Bank of Bermuda in 1989 and has over 25 years of experience in the trust and private client industry, specializing in the management and administration of highly complex, multi-jurisdictional relationships for UHNW families. Barbara holds a Bachelor of Science Degree and has been a member of STEP since 1995.

DOROTHY GAZZARD SENIOR TRUST OFFICER

Dorothy is a founding partner of Meritus and a former Senior Trust Officer in the Private Family Office team at HSBC Private Bank Bermuda. She has over 17 years experience in the trust and fiduciary industry and has gained extensive knowledge and experience in establishing and managing complex portfolio of private trusts and companies for sophisticated UHNW families. Dorothy is also a student member of STEP Bermuda.

HEATHER VANSICKLE, CPA CA SENIOR MANAGER COMPLIANCE OFFICER

Heather joined Meritus in September 2013 having more than 10 years senior management experience with a Canadian Family Office. Heather has been responsible for all aspects of financial reporting and valuation of portfolio assets, as well as assisting in developing cross jurisdictional structures to manage family assets. Heather holds an honours degree in Economics from Queen's University, Canada and is a member of CPA Canada, CPA Bermuda and STEP and a Director on the Barristers and Accountants AML/ATF Board.

DEANNA DIDYK, CPA CA, CFA, TEP FIDUCIARY DIRECTOR

Deanna has over 17 years of experience in the Bermuda trust and corporate services industry. She is the former Managing Director of BCB Paragon Trust Company Limited and Woodmont Trust Company. She manages a portfolio of family relationships and is responsible for operations, systems and new business at Meritus. Deanna is a member of CPA Canada, CPA Bermuda, the CFA Institute and STEP. Deanna is also the current treasurer of BALT.

HEATHER BEANLAND, TEP SENIOR TRUST OFFICER

Heather has over 15 years experience in the legal and trust industry gained through work in Bermuda, Geneva and Jersey, Channel Islands. Throughout her career Heather has worked extensively with UHNW individuals, providing bespoke services for international trust and company structures. Heather is a member of STEP in Bermuda and an Associate Member of the Institute of Legal Executives.

LISA CUMBERBATCH, MA LEAD (BUS), DIP. ITM, TEP SENIOR TRUST OFFICER

Lisa has over 20 years experience providing fiduciary services to UHNW families and has worked in several international jurisdictions including Barbados, Guernsey, Singapore and Bermuda. She holds a Master of Arts in Business Leadership from Trinity Western University, British Columbia, Canada and obtained TEP certification from STEP.

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