

Midwest Taft-Hartley Services

Our strength is in our people



Midwest Taft-Hartley Services understands the special demands placed on Taft-Hartley Funds and Union/Labor related entities.

We offer a combination of experience and services to support your needs:

- **A team approach:** Comprehensive, pro-active, personalized service from professionals with more than 300 years' total experience serving Taft-Hartley clients.
- **Customized service models:** Designed to meet the specific needs of each Taft-Hartley fund and its team of professionals.
- **Investment neutrality:** The freedom to work with your chosen investment managers.
- **Risk management framework:** Attention to compliance standards and risk mitigation.

Our commitment to labor

- Corporate wide UPS contract
- Support and utilize Union printers
- Labor community representatives part of Taft-Hartley Services Team (e.g., Ironworkers, Electrical Workers, AFL-CIO, and Building Trades)
- Ongoing annual budget to support Labor/Union related community and members (e.g., health fairs, member training and development, family events, charitable causes, and advertisements)
- Contributions to Construction Industry Workers Charitable Foundation and DePaul University School of Labor Scholarship
- Property Management commitment to include signatory contractors in project opportunities, both remodel and new construction
- Support of Teamsters National Black Caucus Conference
- Support of Tradeswomen Build Nations Conference and Scholarship Fund
- Active member of International Foundation of Employee Benefit Plans

REPRESENTATIVE CLIENT LIST

- Asbestos Workers
- Bricklayers and Allied Craftworkers (B.A.C.)
- Building Trades
- Carpenters
- Cement Masons
- Ceramic Tile and Marble Masons
- Fire Protection
- Glaziers and Glassworkers
- Hotel Employees Restaurant Employees (H.E.R.E.)
- International Association of Theater and Stagehands (I.A.T.S.E.)
- International Brotherhood of Electrical Workers (I.B.E.W.)
- International Brotherhood of Teamsters
- Ironworkers
- Laborers
- Maritime Workers
- Operating Engineers
- Painters
- Plumbers and Pipefitters
- Roofers
- Sheet Metal Workers
- Tile Finishers
- U.F.C.W. (United Food and Commercial Workers)

Our mission statement

To be the full-service financial services provider of choice by delivering customized trust and coordinating banking solutions with unparalleled service and integrity—one client, Fund, Trustee, servicing professional and member at a time.

Our credentials

- Through our legacy organizations, we have provided **trust and custody services since 1924**
- Custody/safekeeping of assets
- Trust investment services
- Global securities lending
- Support of employer contribution processing
- Coordinated commercial banking and treasury management services

Taft-Hartley Services



Our clients can depend on the strength of our people

Our team

Midwest Taft-Hartley Services brings a depth of experience to each relationship. Relationship managers have extensive benefit plan experience and are knowledgeable in a wide variety of service model types. Equally important, each relationship manager is backed by a team of specialists, allowing Midwest Taft-Hartley Services to provide proactive, highly personalized service.



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For additional information or a personal presentation of our services, please contact the Midwest Taft-Hartley Services team.

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