

# A Closer Look at Our Clients

## Bob Dayton

Portland, Oregon

AS AN ATTORNEY WHO SPECIALIZES IN ESTATE PLANNING, BOB DAYTON often encounters clients in need of trust services, as well. When asked, he has no hesitation about recommending West Coast Trust.

“I do business with a lot of financial institutions in town and I would put West Coast Trust at the top of my list,” said Dayton, who for 30 years has served clients at the Portland law firm Schwabe, Williamson & Wyatt. “At West Coast Trust they take care of their customers. They’re hands on. They have great people and they’re local, which is important.”

Dayton knows firsthand. Two years ago he became a customer of West Coast Trust when he transferred funds from his company’s 401(k) and rolled them into an IRA administered

by West Coast Trust. He was frustrated with his previous bank, which had merged and merged to the point where decisions were being made from out-of-state corporate offices. “A lot of the trust departments have been bought up by East Coast or Midwestern banks so the people you deal with here aren’t the decision makers. It’s not that way at West Coast Trust.”

Dayton especially likes the approach West Coast takes with the investments in his trust. Previously he had held a number of individual stocks and bonds, but at West Coast almost all of his investments are in mutual funds. He spreads his exposure among sectors – large cap, mid cap, small cap, growth, value, foreign, domestic, emerging markets – and allows West Coast Trust to make the day-to-day decisions. “I set guidelines regarding the percentages I want in each sector, then let them run with it,” he said.

Dayton’s investments also include real estate which, he says, West Coast Trust has managed quite well. “Most trust departments

consider real estate a pain because they don’t have any expertise with it,” he said. “West Coast Trust has people who are experts in real estate. They know how to manage it and I look to them for advice.”

Dayton receives monthly statements in the mail and reviews the progress of his investments online, but most of his contact with West Coast Trust is face to face. While other trust companies prefer their customers call a 1-800 number, Dayton simply walks to the West Coast Trust office downtown and meets with trust representatives in person. “It’s just like a good, old-fashioned trust department,” he says.

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