

## YOUR FSTC INSTITUTIONAL TRUST RELATIONSHIP TEAM



**JAMES OKAMURA, CFA, CFP, AWMA**  
**PRESIDENT AND CHIEF INVESTMENT OFFICER**  
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As President, Jim Okamura leads the management team which is responsible for implementing all fiduciary, administration, operations, investment and compliance activities at First State. Jim serves on the Board of Directors as well as Chairing the Fiduciary Steering Committee and Investment Committee. Jim is also responsible for the overall strategic development and works closely with the leadership team to broaden the enterprise and footprint. Jim recently served as the Chief Investment Officer and an Executive Director for Morgan Stanley Trust Services, which is part of Morgan Stanley Private Bank, NA. Jim graduated from Montclair State University with a Bachelor of Science degree in Finance. He has 28 years of financial, investment, and management experience with expertise in Trust Services and Wealth Management. He is a Chartered Financial Analyst (CFA), Certified Financial Planner (CFP) and Accredited Wealth Management Advisor (AWMA). Prior experience includes Citigroup, Legg Mason, Smith Barney Asset Management, Smith Barney Private Trust, Merrill Lynch Trust Companies and First Fidelity Bancorporation.



**DAVID DRAPER**  
**SENIOR VICE PRESIDENT AND CHIEF OPERATING OFFICER**  
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David is the Chief Operating Officer of FSTC in Wilmington, Delaware. David is responsible for overseeing all operational and administration functions for FSTC. He also supervises the FSTC Institutional Trust Administration team, and manages a small number of our complex client relationships. David serves on the FSTC Investment Committee, the Fiduciary Steering Committee, and the Board of Directors. David was employed by Citigroup and its predecessor firms since 1995, and has over 30 years of experience in the financial services industry, with more than 27 years of experience in employee benefit plans and non-profits. He attended the University of Delaware in Newark, DE where his major was Computer Science.



**KELLY T. BROCKSTEDT, CIMA®**  
SENIOR VICE PRESIDENT AND HEAD OF NATIONAL BUSINESS DEVELOPMENT  
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Kelly heads up our business development efforts and is responsible for assembling and bringing together the professionals, clients and FSTC team to provide trusts with fiduciary and investment oversight services. Trust relationships are extremely personal and Kelly takes the initiative to ensure the team at FSTC will meet the needs of each relationship. Kelly has been with FSTC since 2010 and was employed by Morgan Stanley and its predecessor firms since 2000. At Morgan Stanley, Kelly was a Senior Vice President and Director of 401(k) Services for Consulting Group Institutional Services, where she designed and managed one of the first 401(k) fee-based consulting programs on the street. Kelly graduated with a B.A from the University of Delaware and currently holds the Certified Investment Management Analyst (CIMA®) designation. In 2005, Kelly was a graduate of the prestigious Citigroup Developing Talent Program which recognizes 30 women each year in the organization for special projects and advanced training.



**HELEN GARVINE**  
VICE PRESIDENT AND TRUST OFFICER  
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Helen is a Trust Officer located in Wilmington, Delaware who handles administration and clientservicing for corporate defined benefit plans, Taft Hartley plans and endowments and foundations. She was employed by Citigroup and its predecessor firms since 1991. Helen has over 25 years of experience in the financial services industry with more than 20 years of experience servicing employee benefit plans and non-profits. Helen holds a MBA in Economics and a BS Degree in Business and Finance from Mount Saint Mary's University in Emmitsburg, Maryland.



**JAMES ROBINSON**  
VICE PRESIDENT AND TRUST OFFICER  
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Jim is a Trust Officer located in Wilmington, Delaware who handles administration and client servicing for our municipal and public fund pension clients. Jim was employed by Citigroup and its predecessor firms since 1995, and has over 24 years of experience in the financial services industry and over 20 years of experience working with public pension and other retirement plans. Jim holds an Associates of Science degree in Business Administration from Gloucester County College, NJ.



**RENEE SLICER**  
ASSISTANT VICE PRESIDENT AND TRUST OFFICER  
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Renee is a Trust Officer located in Wilmington, Delaware who supports the Senior Trust Officers, and is responsible for the day-to-day administration of institutional trust accounts. Renee comes with over 10 years of experience administering various trust accounts, previously working at UBS Trust Company and New York Private Trust Company. Renee graduated from Immaculata University with a degree in Finance.



**ANGELA O'DONNELL**  
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Angela is a Trust Administrator located in Wilmington, Delaware. Angela was employed by Citigroup and its predecessor firms since 1986, and has over 29 years of experience servicing employee benefits plans and other institutional clients. Angela holds a BS degree in Business Management from Wilmington University. Angela supports the FSTC Trust Officers with opening new accounts and account maintenance and metrics. Angela is bilingual (Spanish/English).



**WESLEY STEM**  
TRUST ADMINISTRATOR  
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Wes is a Trust Administrator located in Wilmington, Delaware. Wesley serves as a liaison between the new accounts area and your trust administration team. Wesley supports the FSTC Trust Officers with all aspects of new client onboarding, including: new account set-up, account maintenance and metrics, and coordination of the relationship transition. Prior to joining FSTC, Wesley worked in various law firms in Baltimore and Philadelphia and has experience with trusts and administration. Wesley graduated from Temple University's Fox School of Business with a B.A. in Legal Studies.