



*Carnegie Investment Counsel*

# PRESS RELEASE

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## **Carnegie Partners With OneTrust Financial**

Carnegie Investment Counsel of Beachwood has been retained by OneTrust Financial, to serve as its investment management sub-advisor for its clients. OneTrust Financial, Troy, OH operates the Miami Valley's only independent, nationally chartered trust company which provides a full complement of trust services on a fee based basis.

"We are excited to be able to extend our reach of services to the clients of OneTrust Financial. Through our partnership, we can deliver custom portfolio management that is focused on the unique needs of each client," says Gary Wagner, Principal of Carnegie. "By building diversified portfolios of individual stocks, bonds and exchange traded funds, expenses can be kept low and conflicts of interest eliminated since there are no proprietary products to be sold. Our philosophy of acting as a fiduciary also melds well with OneTrust's approach."

Tom Kleptz of OneTrust adds, "Our partnership with Carnegie allows our clients to benefit from working with a firm with a track record, deep investment management experience and local contact. Our clients want a personalized approach and Carnegie fits the bill."

Through the arrangement, Carnegie will provide custom portfolio management, access to its seasoned team of investment professionals, planning expertise and marketing support.

About OneTrust Financial - Based in Troy, Ohio, OneTrust Financial is a division of National Independent Trust Company, a nationally chartered trust company based in Ruston, Louisiana. Established earlier this year, partners Tom Kleptz and Judy Hartman, bring over 50 years of trust experience to the firm which provides trust services to individuals and non-profits.

About Carnegie Investment Counsel – Based in the Beachwood, suburb of Cleveland, Ohio, Carnegie Investment Counsel is an SEC Registered Investment Advisor with \$275 Million in Assets Under Management as of August 31, 2010. Carnegie provides investment management and financial planning services to qualified clients, foundations and endowments. With roots dating back to 1974, Carnegie is the successor to the investment management arm of the regional brokerage firm of Prescott, Ball and Turben.

For more information, visit [www.carnegie-capital.com](http://www.carnegie-capital.com) or email [gwagner@ccmac.com](mailto:gwagner@ccmac.com).