

The Mission of Living Branches

Together we empower older adults and families
to lead lives of purpose and joy,
guided by the Mennonite tradition of
care and service to others.



The Willows of Living Branches
2343 Bethlehem Pike
Hatfield, PA 19440
215-822-0688

Souderton Mennonite Homes
207 W. Summit Street
Souderton, PA 18964
215-723-9881

Dock Woods
275 Dock Drive
Lansdale, PA 19446
215-368-4438

Criteria for being a Living Branches Preferred Trust Provider will be at the discretion of Living Branches and will be subject to change. The service and rate discounts offered to residents of Living Branches will be determined at the discretion of each Preferred Trust Provider.

Revised 12/2021

Preferred Trust Provider Program

Helping residents of
Living Branches achieve
their financial goals



You are at the center of why we exist.

The residents of Living Branches are at the heart of everything we do. Our commitment is to create environments where you can be empowered to lead a life filled with purpose and joy. We are dedicated to providing you with excellent services to help you experience wellness in all the facets of your life.

Your goals are important to us.

Helping you achieve your goals is important to us. To reach your objectives, we understand the significance of a valued and trusted partner to provide a helping hand with managing your finances.

Living Branches has designated **Everence Trust Company** and **Univest Bank and Trust Co.** as the official Preferred Trust Providers for Living Branches. Both of these organizations provide a full array of customized trust and financial planning services including estate planning, investment management, and strategic trust administration. Financial and charitable gift planning, bill paying and various other benefits are also available through these preferred providers.



Both of these trusted companies will provide you with personalized and confidential trust services that are tailored to meet your individual needs.

Take advantage of discounted rates.

As a resident of Living Branches, you are eligible to receive Everence and Univest trust related services at discounted rates. We encourage you to take advantage of the many benefits available to you by working with our Preferred Trust Providers.

Everence Trust Company and Univest Bank and Trust Co. have met the criteria for becoming Preferred Trust Providers. As such, these valued partners are very capable to serve your trust and financial needs. Call the representatives at Everence or Univest to set up a free, no-obligation appointment to speak with their advisors about the personal options and choices available for you to meet your goals and objectives.

Everence Trust Company

Jeffrey L. Godshall, CFP®
Trust and Financial Advisor
Everence Trust Company
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Univest Bank and Trust Co.

David Devita, CFP®, CFA™, CIPM
Vice President, Wealth Advisor
Girard, a Univest Wealth Division
1980 S Easton Rd, Suite 150
Doylestown, PA 18901
Phone: 267-898-0524
Email: devitad@meetgirard.com



To become a Living Branches Preferred Trust Provider, the organization must ...

- Have an established and long-standing positive relationship with Living Branches.
- Be an independent corporate entity with an independent board of directors to provide oversight for its fiduciary responsibilities.
- Maintain a certain level of assets under management
- Have been in business for a designated number of years to demonstrate reliability and commitment.