

Tribe starts transition to new minors trust service providers with no disruptions

Following an extensive request for proposal (RFP) and internal review process, the Tribe has decided to transition the Minors Trust Program to a new investment structure managed by two independent firms with extensive experience supporting portfolios across Indian Country.

Sovereign Investment Advisors, LLC will serve as the investment advisor and Providence First Trust Company will serve as the administrator of the program. It is anticipated that once fully implemented, the restructured Minors Trust Program will deliver significant enhancements to the minor beneficiaries in the form of, among other things:

- Reduced fees
- Institutional investment platform and process
- Documented compliance with the global fiduciary standards of excellence

- Improved beneficiary reporting and online account access
- Significant Tribal administration efficiencies
- A comprehensive platform to learn financial literacy

As we begin the initial phase of the program transition, we wanted to share an introduction to both firms and provide an anticipated project timeline.

New service providers

Sovereign Investment Advisors (SIA) will serve as the new investment advisor for the Minors Trust Program. SIA is a 100% American Indian-owned, independent, SEC-registered investment advisory firm that works exclusively with Tribal governments, Tribal entities, Tribal enterprises and nonprofit organizations with a Tribally specific mission.

SIA has a demonstrated proficiency in providing comprehensive investment support for all manner of investment programs, including minors trust funds, settlement funds, permanent funds, short-term cash management, and 401k and pension plans.

SIA manages more than \$1.8 billion in Tribal assets and supports more than 80 Tribes across the U.S. and Canada.

Providence First Trust will be the trust administrator handling the accounting, statements, taxes and distributions of the trust.

Providence specializes in trustee services for American Indian children's trusts, serving more than 25 other Tribes' trusts across the country and nearly 40,000 trust beneficiaries with more than \$4 billion of trust assets.

Its officers are experts in the specific laws and tax regulations pertaining to these trusts and when you call Providence, you will speak directly to one of their

Tribal trusts staff members who exclusively work with American Indian parents and children.

Transition process

Sovereign Investment Advisors and Providence First Trust have experience in working as joint service providers for other Tribal clients' trusts and will work toward a seamless transition. There will not be any disruption to any of the investments, distributions or reporting of trust activity. The initial transition process is already under way and will be implemented through a series of very deliberate and well-coordinated steps over the next few months. Our goal is to complete the full transition by the end of July.

There will be additional updates over the next few months and a series of formal announcements culminating in an in-person education session for all minor beneficiaries and guardians later this year.

Mason, Flatt graduate from Tribal Home Visiting; see program details below

Congratulations to Jamie Mason for graduating from the Siletz Tribal Home Visiting program.

Jamie began Home Visiting right before AnDrae was born until May after AnDrae turned 3 years old. While in the program, they has moved into a home of their own.

Jamie always engaged fully in the lessons and was always willing to share her thoughts and ideas. She and her family also participated in Home Visiting family events.

Even though she wasn't a first-time mom, she enjoyed the program with all the information and support she received and enjoyed the cultural and other activities.



Jamie Mason and AnDrae

Congratulations to Sally Flatt for graduating from the Siletz Tribal Home Visiting program.

Sally began shortly after Micaiah was born and continued in the program until May after Micaiah turned 3. While in the program, she gained employment, moved into a new place and started attending Oregon Coast Community College to work toward a career in nursing.

Sally always participated and engaged in the Home Visiting lessons and the family events.

She is grateful for the program, especially since her children are so far apart in age. She learned a lot and loved the support and encouragement she received while in the program.



Sally Flatt and Micaiah

For information about the Home Visiting program, contact Danelle Smith at 541-444-9603 or danelles@ctsi.nsn.us if you're in the coastal areas or Lori Christy at 503-390-9494 or loric@ctsi.nsn.us if you're in the Willamette Valley.

Siletz Tribal Home Visiting Program

The Home Visiting Program is currently accepting new clients. The program is free and we work with families prenatally until the child turns 3 years old.

The Home Visiting staff strives to provide flexible home visits by working with the family's schedule as well as meeting in a location outside the home or virtually at this time for more convenience for the family. Our program uses a culturally based curriculum called Family Spirit.

Our curriculum begins prenatally, but families can start up until the child turns 1. At first, visits are weekly, moving to bi-weekly and then monthly. In addition to home visits, we also provide support and encouragement, parenting and life skills for successful and positive parenting,

resources and referrals, developmental screenings (ages and stages questionnaires) and cultural activities.

Home visits focus on the following sections of our curriculum:

- **Prenatal Care:** what to expect during your pregnancy up through birth
- **Infant Care:** what to expect after your baby is born
- **Healthy Living**
- **Your Growing Child:** developmental milestones for your child – physical, social, emotional
- **Toddler Care:** information for your child age 1 and up
- **My Family and Me:** budgeting, nutrition, goal setting

Eligibility Requirements

- Live in the 11-county service area
- Pregnant or have a child under age 1
- Enrolled Siletz Tribal member head of household or dependent child and meet one of the following criteria:
 - Income below 300% of the federal poverty level
 - Household that resides in rural location that has limited employment opportunities
 - First-time parent
 - Household with at least one adult without a post-secondary certificate
 - Family has experienced trauma, chemical dependency or mental health barriers
 - Other eligibility criteria may apply

Babies!



Alluka Skye Navarro was born May 20, 2021, at 9:36 a.m. to Kassandra and Josh Navarro. She weighed 7 pounds, 9 ounces and was 19.5 inches long. For this child we have prayed. ♥

Dental services eligible for PRC even if you live near Siletz Clinic or IHS facility

PRC-eligible patients (Tribal members, dependents, pregnancy) who live within 40-miles of the Siletz Clinic or an IHS facility are now eligible to obtain services at an outside dental facility. Due to safety measures taken in response to COVID-19, the Siletz Dental Department currently operates on a reduced schedule, which impacts its ability to serve all Tribal members who want oral care. PRC-eligible services will be the same types of services you would be eligible for at the Siletz Clinic or another IHS facility. You do NOT need a referral, but you will NEED to call PRC for an authorization number. If you are unsure if specific dental services will be paid, contact PRC at 541-444-1236.