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**TAMPA BAY TRUST COMPANY HOSTS LUNCHEON FORUM FOR INVESTORS  
Patrick Dorsey and Donald Jowdy Present Investment Strategies and Philosophies**

**TAMPA, Fla. (July 12, 2011)** – A unique provider of comprehensive trust and investment management services, The Tampa Bay Trust Company held a luncheon forum on Thursday, June 24<sup>th</sup> at The Centre Club in Tampa. The event featured strategic investment presentations by nationally known market analyst and former Director of Equity Research for Morningstar, Patrick Dorsey and respected Tampa-investment advisor Donald Jowdy, Senior Portfolio Manager, The Tampa Bay Trust Company and President of Suncoast Equity Management.

Mr. Dorsey, Vice Chairman and Director of Research & Strategy of the Tampa Bay Trust/Sanibel Captiva Trust Company, was previously responsible for the overall direction of Morningstar's equity research, as well as for communicating Morningstar's ideas to the media and clients. He led the development of Morningstar's economic moat ratings as well as the methodology behind Morningstar's framework for competitive analysis.

During his thirty-minute speech, Mr. Dorsey shared with the audience his philosophies behind the economic moat concept he has successfully developed. "All great companies have an entrenched economic moat that encompasses their strategic business model," states Dorsey. "A moat is a structural characteristic that helps the business fend off the competition and remain highly profitable and successful over time." Dorsey, who in addition to his leadership responsibilities with The Tampa Bay/Sanibel Captiva Trust Company's, was also recently appointed Director of Suncoast Equity Management, concludes, "Economic moats are significant in that they provide one of three distinct values for companies. First, moats add economic value for a company that can compound cash flow for many years, versus companies that cannot. Secondly, economic moats enforce investment discipline where companies stay highly profitable for many years and lastly, companies with economic moats are more resilient and can recover from temporary financial instability much quicker and efficiently than companies that have not initiated the moat philosophy."

Donald Jowdy, Founder and President of Suncoast Equity concluded the forum by engaging the attendees in his philosophy of "having the proper mindset for successful investing." Mr. Jowdy went on to say, "individuals should invest in companies not stocks thereby consider ones' self a part owner in the business. Invest in companies that have a strong competitive advantage or moat characteristics such as scale or strong brands and that hold a 'margin of safety.'"

Jowdy concluded, "Invest in companies you understand, and stay with businesses that boast consistent business and financial track records. A combination of these factors defines an attractive investment opportunity." Finally, Investors should approach a market opportunity by determining the intrinsic value of the stock, consistently observing the price (over time) and finally by never acting on a stock unless there is a discernable price advantage for you!"

## **About The Tampa Bay Trust Company:**

The Tampa Bay Trust Company / Sanibel Captiva Trust Company / Naples Trust Company, is a state-chartered independent trust company regulated by the Florida Office of Financial Institutions. Wealth management services provided by the firm include investment management, trust administration, and financial counseling to individuals, families, businesses, non-profit organizations and endowment funds. Services are best suited for those individuals with \$2 million or more to invest.

The Tampa Bay Trust Company wealth management services are absolute-return oriented, performance-driven, and adhere to a strict philosophy and investment process. The Trust Company's unique Integrated Asset Allocation approach (Growth, Risk Reduction, and Inflation/Currency Protection allows client portfolios to be separately managed and individually tailored to each client's total return and cash flow requirements. The firm's investment management services comply with Florida Prudent Investor Rule (Florida Statutes, Chapter 518.11).

Pat Dorsey is the author of two books--*The Five Rules for Successful Stock Investing*, and *The Little Book that Builds Wealth*--and currently writes column's about investing for *Money Magazine*. Mr. Dorsey appears weekly on Fox News Channel's "Bulls & Bears" show, and has been quoted in publications such as *The Wall Street Journal*, and *BusinessWeek*. Pat holds a master's degree in political science from Northwestern University and a bachelor's degree in government from Wesleyan University.

Suncoast Equity Management (SEM), Inc., is an SEC registered investment advisor serving both individual and institutional clients. The company's primary focus consists of a portfolio of high quality equities that ranks, when adjusted for low risks incurred, in the top decile among its peer groups. The SEM corporate office located in Tampa, Florida also has an alliance with The Trust Company's of Sanibel Captiva, Naples, Chicago and Tampa, which is a state chartered independent trust company regulated by the Florida Office of Financial Institutions. Founded in 2001, the Trust Company manages over \$650 million in client assets and provides wealth management to over 200 high net-worth families, foundations, and non-profit organizations.

For more information on The Tampa Bay Trust Company, please call 813.915.6202 or visit the firm's website: [www.tampabaytrustcompany.com](http://www.tampabaytrustcompany.com).

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