



First National Bank Alaska



## INVESTMENT MANAGEMENT & TRUST SERVICES





# Your needs are unique.

Our experienced Wealth Management team is committed to building a financial plan to meet your short and long-term goals.

Whether planning for retirement, rolling over IRAs or a 401(k) account, administering a trust fund or investing for the future, our values of responsiveness, integrity and dedication to your success guide everything we do.

## TRUSTED

Honesty and integrity are fiduciary principles. The advice and guidance we provide will always be conflict-free and in your best interests.

## COMMITTED TO YOUR SUCCESS

From enjoying the benefits of retirement to funding a cause and/or organization that aligns with your values, our local Wealth Management experts will be your advocates every step of the way.

## EXPERIENCED

Each Wealth Management officer brings decades of experience to your portfolio management. Our team of experts stands ready to advise and serve your trust and investment needs.

## ACCESSIBLE

Senior leadership and bank directors, all longtime Alaskans and community leaders, are accessible to you.

## A DYNAMIC PROCESS

# Your goals. Our focus.

1

Through in-depth conversations, we work with you to define your purpose and goals and establish your risk/return expectations for your portfolio.

2

We create your personalized investment strategy, which includes:

- Developing the strategic asset allocation
- A cash flow analysis
- Incorporating your customized preferences

3

Our open investment platform allows flexibility and ensures objectiveness. We implement only solutions that have passed our Investment Committee's due-diligence process.

4

As your goals and life evolve, we adjust and rebalance your portfolio to meet your unique needs.



## TRUST SERVICES

Following through on your exact wishes and directions is a great responsibility. Trusted and respected among local attorneys, First National is the “go to” in Alaska for trust services.

### Trustee

As your trustee or successor trustee we will professionally manage your assets and ensure your wishes are honored.

### Estate Settlement

As your personal representative, we will settle your estate, leveraging First National's experience and technical expertise. Let us handle your estate tax returns, administrative details, and/or asset distribution. These tasks can be burdensome and costly if not handled by professionals.

### Asset Management

Manage your portfolio, real estate holdings, and/or other assets. Our team can maintain and/or distribute your real estate quickly and accurately.

### Alaska State Statute Expertise

Take advantage of Alaska's unique asset protection, community property, and other estate planning tools. We work with many local trust and estate attorneys, building on our decades of experience to serve you best.

To learn more about how First National's Wealth Management Department can help you, visit [FNBAAlaska.com](https://fnba.alaska.com), or call **907-777-4560** in Anchorage, or **1-800-856-4362** in other communities.



PRODUCTS PURCHASED THROUGH THE BANK'S WEALTH MANAGEMENT DEPARTMENT ARE NOT FDIC INSURED, NOT GUARANTEED AND MAY LOSE VALUE.