THE ONE SOLUTION

A CUSTOMIZED APPROACH

FINANCIAL PLANNING

INVESTMENT MANAGEMENT

TRUST SERVICES

YOUR GOALS OUR FOCUS

Our local team of experts works with you to define your goals, and establish risk and return expectations for your portfolio.

- **Short-term liquidity** (0-2 years)
  Covers all spending and emergency cash needs.
- **Medium- to long-term longevity** (2-10 years)
  Funds future liabilities and lifestyle.
- **Long-term legacy** (10 years+)
  Funds generational and multi-generational lifestyles including charitable and foundational style investing.

PLAN FOR YOUR FUTURE TODAY

We use industry-leading financial planning technology to create a personalized investment strategy to meet your needs.

- Retirement planning
- Social Security modeling
- Cash flow forecasting
- College planning
- Insurance analysis

FLEXIBILITY YOU WANT, STABILITY YOU NEED

Our open investment platform allows flexibility and ensures objectiveness. We implement only solutions that have passed the bank's own investment committee's due-diligence process.

- **Discretionary portfolios**
  Your team of local experts makes investment decisions on your behalf.
- **Client-directed portfolios**
  Investment transactions are approved by you.

ESTATE MANAGEMENT SIMPIFIED

Managing trusts and estate plans can be complex. Our local team of experts can help navigate Alaska's unique asset protection, community property and estate planning challenges.

- **A corporate fiduciary**
  Trust powers granted by the Office of the Comptroller of the Currency (OCC).
- **Estate settlement**
  We provide the experience and technical expertise in attending to administrative details to managing and distributing your assets according to your wishes.
- **Specialty asset management**
  We manage illiquid and hard-to-value assets including, but not limited to, real estate, LLC, and promissory notes.

Wealth Management and Trust Committee

These knowledgeable and longtime Alaskans directly oversee the activities and operations of the wealth management team, approving account actions, and providing guidance and counsel by means of two detailed Wealth Management Committee meetings held each month throughout the year. As members of the Board of Directors, these experienced Alaskans also help ensure the bank's own financial success and are known across the Great Land for their strong leadership and extraordinary business acumen.

Betsy Lawer
BOARD CHAIR AND CHIEF EXECUTIVE OFFICER

Doug Longacre
PRESIDENT AND DIRECTOR

Admiral Tom Barret USCG (Ret.)
BOARD MEMBER AND INVESTMENT COMMITTEE CHAIR

Wealth Management Officers

Each Wealth Management officer brings decades of experience to your portfolio management. Our values of responsiveness, integrity and dedication to your success guide everything they do.

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WEALTH MANAGEMENT
First National Bank Alaska