

# Board of Directors

The Board of Directors oversees Wealth Management because of the department's fiduciary status. With more than 100 years of cumulative investment experience, these Alaskans are the same specialists who guide the bank's own investment decisions and activities.

# Shaping Tomorrow

As First National Bank Alaska reaches its 100th year of business, we have earned the trust of Alaskans by providing valuable banking services to businesses and individuals, and by offering strength, stability and commitment to your success. With shared pride and dedication, we look forward to our next century of business in the Last Frontier.

# FIRST NATIONAL BANK ALASKA WEALTH MANAGEMENT

# Trusted Experienced Accessible



**Betsy Lawer**  
BOARD CHAIR  
AND CEO



**Lucy Mahan**  
VICE CHAIR – OWNER  
TRANSITIONAL COUNSELING, LLC



**Doug Longacre**  
PRESIDENT



**Admiral Tom Barrett**  
USCG (Ret.)  
BUSINESS COMMUNITY MEMBER



**Perry Eaton**  
LEAD DIRECTOR – ARTIST



**Margy Johnson**  
BUSINESS COMMUNITY MEMBER



**Jane Klopfer**  
BUSINESS COMMUNITY MEMBER



**Tara Sweeney**  
BUSINESS COMMUNITY MEMBER



**Tom Tougas**  
OWNER, MAJOR MARINE TOURS



**Janet Weiss**  
BUSINESS COMMUNITY MEMBER



Alaska Business magazine "Best of Alaska Business" Awards

Dear valued customer,

Your wealth management needs are unique and we greatly appreciate the confidence you've placed in First National to help you achieve your expectations. We believe the bank's 100 years of experience and v knowledge is a significant asset in assisting you to reach your long- and short-term financial goals.

We think you'll find our extensive expertise and knowledge will further support and deepen your investment management and trust relationship with us. Each of our Wealth Management experts is backed by First National's experienced Board of Directors and the board's Wealth Management and Trust Committee.

Our team of local experts stands ready to help you, whatever your Trust or Investment Management needs may be. Thanks again for your confidence in First National Bank Alaska.

Sincerely,

*Betsy Lawer*  
BOARD CHAIR AND CEO



**Betsy Lawer**  
BOARD CHAIR  
AND CEO



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

First National Bank Alaska 907-777-4560 [FNBAlaska.com/WM](https://www.FNBAlaska.com/WM)



# THE ONE SOLUTION

## 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.

## A CUSTOMIZED APPROACH

## FINANCIAL PLANNING

## INVESTMENT MANAGEMENT

## TRUST SERVICES

## 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 SIMPLIFIED

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



**Admiral Tom Barret**  
**USCG (Ret.)**  
BOARD MEMBER AND WEALTH  
MANAGEMENT AND TRUST  
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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