

## 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.



**Betsy Lawer**  
BOARD CHAIR AND CEO/PRESIDENT



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



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



**Perry Eaton**  
LEAD DIRECTOR, ARTIST



**Margy Johnson**  
BUSINESS COMMUNITY MEMBER



**Jane Klopfer**  
BUSINESS COMMUNITY MEMBER



**Doug Longacre**  
FORMER FIRST NATIONAL PRESIDENT  
AND BUSINESS COMMUNITY MEMBER



**Tara Sweeney**  
OWNER, TACK 71 STRATEGIES



**Tom Tougas**  
OWNER, MAJOR MARINE TOURS



**Janet Weiss**  
BUSINESS COMMUNITY MEMBER



**First National Bank  
ALASKA**

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

## Shaping Tomorrow Since 1922

With more than 100 years of business, First National Bank Alaska has 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 Great Land.



Alaska Business magazine "Best of Alaska Business" Awards



## TRUST AND INVESTMENT MANAGEMENT SERVICES

# Wealth Management

Dear valued customer,

Your wealth management needs are unique and you can be confident First National can help you achieve your expectations. As a wealth management client, you will enjoy the benefit of perhaps our bank's most significant asset—100+ years of experience—an asset we will leverage every day as we assist you in reaching your long- and short-term financial goals.

Trust us to anticipate your needs, provide the very best customer service, and work hard every day to deepen your investment management and/or trust relationship with us. Our team of local experts stands ready to help you, whatever your trust or investment management needs may be. We look forward to talking with you.

Sincerely,

*Betsy Lawer*  
BOARD CHAIR AND CEO/PRESIDENT



**Betsy Lawer**  
BOARD CHAIR AND  
CEO/PRESIDENT



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

## 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

# THE ONE SOLUTION

## PLAN FOR YOUR FUTURE TODAY

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

- Retirement planning
- Cash flow forecasting
- College planning

## THE FLEXIBILITY YOU WANT, THE STABILITY YOU NEED



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

- **Bank-Directed portfolios**  
Your team of local wealth management experts makes investment decisions on your behalf.
- **Client-Directed portfolios**  
Investment transactions are directed 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 experience and technical expertise in attending to administrative details as well as 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, LLCs, 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.



**Betsy Lawer**  
BOARD CHAIR  
AND  
CEO/PRESIDENT



**Doug Longacre**  
FORMER  
FIRST NATIONAL PRESIDENT  
AND BUSINESS COMMUNITY  
MEMBER



**Admiral Tom Barrett  
USCG (Ret.)**  
BOARD MEMBER AND  
WEALTH MANAGEMENT AND  
TRUST COMMITTEE CHAIR



**Michele Schuh**  
CHIEF FINANCIAL OFFICER  
AND EXECUTIVE  
VICE PRESIDENT

## Wealth Management Investment Committee

The Wealth Management Investment Committee uses their decades of combined experience to manage asset performance, review financials and strategize the bank's investments.



**Cheri Gillian**  
SENIOR EXECUTIVE OFFICER  
CHIEF ADMINISTRATIVE  
OFFICER AND  
BOARD SECRETARY



**Doug Longacre**  
CHAIR OF COMMITTEE  
AND BUSINESS  
COMMUNITY MEMBER



**Chad Steadman**  
SENIOR VICE PRESIDENT  
AND  
SENIOR CORPORATE  
LENDING DIRECTOR



**Neva McCormick**  
ACTING  
WEALTH  
MANAGEMENT  
DIRECTOR

## Wealth Management Officers

Our Wealth Management officers bring decades of experience to your portfolio management. Our values of responsiveness, integrity and dedication to your success guide everything we do.



**Laura Asgari**  
INVESTMENT  
MANAGEMENT OFFICER  
**907.777.4573**  
LAsgari@FNBAAlaska.com



**Nichole Kennedy**  
INVESTMENT  
MANAGEMENT OFFICER  
**907.777.4567**  
NKennedy@FNBAAlaska.com



**Kara Blake**  
BUSINESS SUPPORT  
MANAGER  
**907.777.4564**  
KBlake@FNBAAlaska.com



**Evert McDowell**  
TRUST ACCOUNT  
ADMINISTRATOR  
AND WEALTH  
MANAGEMENT OFFICER  
**907.777.4574**  
EMcDowell@FNBAAlaska.com