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.





VICE CHAIR - OWNER

TRANSITIONAL COUNSELING, LLC

Admiral Tom Barrett

USCG (Ret.)

BUSINESS COMMUNITY MEMBER

Jane Klopfer

BUSINESS COMMUNITY MEMBER

Tom Tougas

OWNER, MAJOR MARINE TOURS

Betsy Lawer BOARD CHAIR AND CEO/PRESIDENT



Perry Eaton LEAD DIRECTOR, ARTIST



Doug Longacre FORMER FIRST NATIONAL PRESIDENT AND BUSINESS COMMUNITY MEMBER



Tara Sweeney OWNER, TACK 71 STRATEGIES



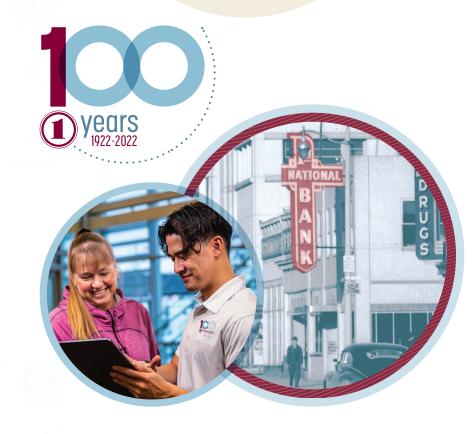
Janet Weiss BUSINESS COMMUNITY MEMBER



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.



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

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,

Betay Lawer BOARD CHAIR AND CEO/PRESIDENT



First National Bank Alaska 907-777-4560 FNBAlaska.com/WM



A CUSTOMIZED

APPROACH

FINANCIAL

PLANNING

INVESTMENT

MANAGEMENT

TRUST

SERVICES

THE

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.

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 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 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.





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.





Betsy Lawer BOARD CHAIR AND CEO/PRESIDENT



FORMER FIRST NATIONAL PRESIDENT AND BUSINESS COMMUNITY MEMBER



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



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

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Nichole Kennedy INVESTMENT MANAGEMENT OFFICER 907.777.4567 NKennedv@FNBAlaska.com



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



Evert McDowell TRUST ACCOUNT ADMINISTRATOR AND WEALTH MANAGEMENT OFFICER 907.777.4574 FMcDowell@FNBAlaska.com