

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

Shaping Tomorrow Since 1922

As First National Bank Alaska surpasses 100 years 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 Great Land.



Alaska Business magazine "Best of Alaska Business" Awards

Trusted Experienced Accessible

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 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/PRESIDENT



Betsy Lawer
BOARD CHAIR AND
CEO/PRESIDENT



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

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 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, real estate, 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

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
FORMER
FIRST NATIONAL PRESIDENT
AND BUSINESS COMMUNITY
MEMBER



Chad Steadman
SENIOR VICE PRESIDENT
AND
CORPORATE
LENDING DIRECTOR



Neva McCormick
ACTING
WEALTH
MANAGEMENT
DIRECTOR

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 we do.



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