

What is your financial future?

We'll take you there.

As you journey through life, you pursue a number of important goals such as establishing a career, starting a family, building your own business, and achieving wealth. You know instinctively that reaching each goal depends on making the right decisions.

The choices you've already made have taken you far, yet there are more difficult decisions ahead. We at PriVest understand that the more you have, the more complicated your financial choices become...and nothing is more overwhelming than feeling alone in uncharted territory.

You can afford many things at this stage in your life, but can you afford to make the wrong decisions about your financial future?

Effective financial planning is the cornerstone of your continued success and the success of your business. You can depend on the trustworthy professionals at PriVest Bank to guide you toward your desired financial future.

While other banks leave the planning up to you, the financial experts at PriVest are with you every step of the way, anticipating your unique needs and helping you avoid common pitfalls.

Our mission at PriVest Bank is to provide our clients individually tailored strategies to develop, grow, enjoy, and distribute their wealth while offering financial solutions that foster long-term banking relationships and peace of mind.

How do we accomplish this mission?

A Team of Experts

Our executive management team and private banking officers average over 25 years of experience in financial services, and are skilled at understanding the business of each client. Your relationship with a PriVest banking officer will provide the expertise and ideas necessary for prompt and effective financial solutions.

Perfect Partnership

Wouldn't it be comforting to have a partnership with a financial expert who is fully dedicated to meeting your goals? When you bank with PriVest, you will have just that! Your private banking officer will listen closely to your needs, recommend strategies to achieve your financial goals, and connect you with the right resources to ensure success.

Tailored Solutions

The PriVest professionals recognize that you have unique needs. That is why we provide individually tailored financial strategies rather than a menu of prepackaged services. Whatever your preference is toward risk and rewards, PriVest will help create a plan that is right for you.

Convenience

Because your convenience is always a top priority at PriVest, we offer a number of banking alternatives.

- ▲ Consult with a PriVest professional any time by dialing 1-800-PRI-VEST.
- ▲ Conduct transactions conveniently online, by telephone, by mail, or in person.
- ▲ Have our couriers pick up your business and personal deposits.
- ▲ Call on our next day delivery service to deliver official documents to your home or office.

Realize Your Financial Future With PriVest

Successful individuals like you often have unique financial demands. From simple transactional accounts to complex lines of credit, PriVest provides a wide range of personalized services to meet your distinctive needs.

PriVest's financial expertise and vast array of services, coupled with an in-depth understanding of your needs, will bring your long-term goals within reach.

With PriVest you will always have access to the insight of a trusted advisor who fully understands your individual banking preferences, tax considerations, and cash flow requirements. Your banking officer works with specialists in several disciplines to formulate integrated strategies for your individual banking needs. Because you work directly with decision makers at PriVest, you can always expect prompt responses and effective solutions.

Our Private Client Services Include:

- ▲ Checking Accounts
- ▲ Certificates of Deposit
- ▲ Money Market Accounts
- ▲ Loans: Real Estate, Auto,
- ▲ Lines of Credit, and Home Equity Loans
- ▲ 24 Hour Worldwide ATM Access
- ▲ Wire Transfers
- ▲ Foreign Exchange

PriVest Will Keep Your Business On The Fast Track

The success of your business depends on vision, desire, drive, and access to the right resources. Your vision, desire, and drive are always present, but finding the right resources and people you can trust is sometimes easier said than done. Relationships with experts such as your banker, CPA, and attorney provide resources crucial to the success of your business. Your private banking partnership with PriVest can be the catalyst that enables you to make the most of your professional relationships.

PriVest provides the services your company needs to operate efficiently and thrive financially.

From short-term credit facilities to long-term financing needs and family business succession planning, PriVest connects you with the vital resources you need to make informed decisions.

PriVest's integrated approach combines the expertise of operations specialists, business analysts, personal banking representatives, and investment professionals. Based on a thorough analysis of your business, these experts will devise detailed strategies to reach your business objectives.

PriVest's Business Services Include:

- ▲ Cash Management Accounts
- ▲ Working Capital and Revolving Lines of Credit
- ▲ Term Loans for Equipment and Fixed Assets
- ▲ Commercial Real-Estate Loans
- ▲ Construction Loans
- ▲ Standby Letters of Credit
- ▲ Payroll Solutions
- ▲ Merchant Card Services
- ▲ SBA Loans
- ▲ Employee Benefits

PriVest Will Take Your Wealth To A Higher Level

It is a well-known fact that affluent individuals are affected to a greater degree by economic factors, taxes, and rapidly changing laws that govern business and income. Without prudent financial planning, you could miss opportunities to see your wealth grow or lose a significant portion of income to unnecessary taxes.

PriVest will help you avoid turbulent forces that impact your finances, and guide you to higher levels of financial success.

PriVest is dedicated to help protect and build your hard-earned savings, working capital, and investments. The professionals at PriVest will put their experience to work for you, making the most of your assets today, and maximizing the wealth you will pass to your beneficiaries in the future. Our experts will incorporate in-depth analyses of insurance, tax, investment, retirement, estate, and other financial concerns to construct a wealth management plan specifically tailored to your unique needs.

PriVest's Wealth Management Services Include:

- ▲ Investment Management
- ▲ Estate Planning
- ▲ Retirement Planning
- ▲ Deferred Compensation Strategies
- ▲ Insurance and Risk Management
- ▲ Trust Administration