

## Boutique private banking solutions.

### PRIVATE BANKING

Dedicated Private Relationship  
Specialist on call to execute your  
day-to-day administration activities:

- Custom banking relationship
- Complex transfer and asset implementation experience
- Access to exclusive custodians
- Access to, and assistance with, trustee services
- Institutional cash management
- Tax document management
- Tax document facilitation
- Secure, cloud-based document storage via your Vault

Cash Management, including  
advising on and scheduling:

- Tax and insurance policy premiums payments
- Coordination with outside banking relationships
- Domestic and international transfers

### LENDING

Sophisticated financing solutions:

- Prominent lending facilities
- Preferred lending rates

### PRIVATE INVESTMENT ADMINISTRATION

Dedicated Private Relationship  
Specialist to administer activities for  
your private investments:

- Custom reporting
- Electronic subscription service
- Capital call oversight

