Your Plans. Your Passion. Your Legacy.

At First American Bank Private Wealth Management we understand that every client is unique. Our personal approach allows us to clearly understand your individual needs, goals, and objectives. We will work with you to create a customized and comprehensive wealth plan to meet your financial needs.

We create comprehensive strategies for successful individuals, families, business owners, and professionals. We will work with you to navigate through the various stages of planning, including wealth accumulation, protection, and legacy. Our goal is to build lasting, meaningful relationships based on trust, integrity and professional client service.

Core Principles to Your Comprehensive Wealth Plan

Investment Planning

- Prudent Management Of Asset Allocation
- Tax Efficient Investing Strategies
- Goal Driven Investment Strategy
- Portfolio Risk Assessment
- Rebalance/Reallocate

Retirement Planning

- Personal Savings Strategies
- Workplace Savings Strategies
- Income Needs Analysis
- Social Security

Risk Management Planning

- Disability Income Insurance
- Life Insurance
- Long Term Care
- Health Insurance
- Asset Insurance

Legacy Planning

- Titling Of Assets
- Estate Planning
- Charitable Gifting
- Disability Planning
- Wealth Transfer
- Executor / Trustee

First American Bank Private Wealth Management is committed to creating a comprehensive plan specifically centered around you and your financial needs.

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Past performance is not indicative of future results.
Investment and insurance products are subject to investment risk including possible loss of the principal amount invested and are not deposits of First American Bank. Investment and insurance products are not insured, protected or guaranteed by the FDIC, any other federal government agency, or First American Bank and may lose value.

NOT FDIC INSURED | *No bank guarantee* | *May lose value*

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