



## Boutique banking solutions.

### Private Banking

**Dedicated Private Wealth Associate on call to execute your portfolio's day-to-day administration activities:**

- Custom banking relationship
- Complex portfolio transfer and asset implementation experience
- Access to exclusive Fidelity Family Office and other custodians
- Access to, and assistance with, Trustee Services
- Institutional cash management
- Tax document facilitation
- Secure, cloud-based document storage via your True Fiduciary® Vault

**Cash management, including facilitating:**

- 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 Wealth Associate to administer activities for your portfolio's private investments:**

- Custom reporting
- Electronic subscription service
- Capital call facilitation

## Disclosures

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