

## **What is Private Banking?**

Our Private Banking experience focuses on personalized attention and exceptional service. As a Ledyard Private Banking client, you are assigned a dedicated Private Banker to work with you to review and manage your full financial picture. Our Private Bankers are highly skilled professionals with a broad expertise in banking and lending. They are adept at assessing individual financial situations and offering out-of-the-box thinking for your unique situation. We build a personalized team to help you look at your future aspirations and guide you with our unique scenario planning, investment management and trust & estate planning.

## **Who are Ledyard's typical Private Banking clients?**

Executives, professionals in the medical, dental and higher education field, attorneys, accountants, retirees, and business owners make up most of our clients. We also focus on our client's next generation to make sure you have peace of mind that your estate will be passed on through a team of professionals that know your loved ones.

## **How does Private Banking save you time and add value?**

By acting as a single point of contact for a client's diverse financial requirements, we eliminate their need to consult multiple professionals, thereby saving them considerable time and effort. Our tailored advice and ability to handle complex transactions frees our clients from the burden of navigating many financial complexities and the associated time-consuming tasks.

## **What other services does Ledyard offer?**

We specialize in goals-based investment management. With our thorough scenario planning roadmap, we take the time to understand your needs, wants and wishes for living your best life in retirement. While completing this process, we can review your existing investment account holdings and provide thoughts and solutions on how we can help provide you confidence for the future. We are a fiduciary and can serve as a corporate trustee.

## **Why should you become a Ledyard Private Banking client?**

Your dedicated Private Banker will always put your best interest first, providing the one-on-one personalized approach required to ensure that your unique situation is fully understood and addressed. We complement that approach with sophisticated technology that will help you visualize all aspects of your financial future. Our goal is to elevate your financial well-being and make your life better!