



Facts & Figures

About Us



AMG National Trust Bank is an independent wealth management boutique with private banking services that helps people and institutions build and preserve wealth.

AMG National Trust Bank provides comprehensive investment management, financial counseling, tax, philanthropic, trust administration and private banking services to high-net-worth individuals, corporate executives, business owners and entrepreneurs, as well as institutions.

Leadership

Earl L. Wright is chief executive officer and board chairman of AMG National Trust Bank. Mr. Wright earned his MBA from The Wharton School of the University of Pennsylvania and was honored as a "Master in Profession" from his undergraduate alma mater, the University of Nebraska. He served as an academic advisor to help start the Masters of Finance Program at the University of Denver and has co-authored articles for *Trusts & Estates and Personal Financial Planning*.

Michael D. Bergmann, Ph.D. is senior executive vice president and chief investment officer of AMG National Trust Bank. Dr. Bergmann holds a doctorate degree in Business Economics and a master's degree in Statistics from Stanford University. Dr. Bergmann developed the firm's proprietary asset allocation models that integrate key concepts of Modern Portfolio Theory. He is the author of the firm's quarterly research report *Notes on the Economy* and is a member of the American Economics Association, the American Finance Association and the National Association for Business Economics.

Corporate Clients

This is a partial corporate client list as of April 1, 2011. The selection of clients on this list is based on the clients' geographic location, industry, name recognition and/or relationship with AMG and not on investment performance criteria or client endorsement.

AT&T	Haselden Construction	PPG Industries, Inc.
Ball Corporation	Hormel & Company	VF Corporation
Delta Dental	Nationwide Insurance	
Kodak	Pella Corp	

FAST FACTS

- Founded in 1972 as a division of a Wall Street investment bank and independently incorporated in 1975.
- Granted commercial banking charter in 2008.
- Corporate headquarters located in Denver; main banking office in Boulder. Other offices located in Chicago, Morristown and Virginia Beach.
- Clients across the U.S. and overseas.
- More than \$2.8 billion in assets under management.

MISSION

AMG National Trust Bank is built around the current and future needs of its clients. Our mission is to help clients achieve their unique financial goals by integrating sound judgment, objective advice and excellence in personal service.

COMPREHENSIVE SERVICES

- Investment Management and Advice
- Financial Counseling
- Personal Financial Management
- Access to Alternative Investments
- Personal Trust Administration
- IRA and 401k Rollover Accounts
- Income and Gift Tax Return Preparation
- AMG Charitable Gift Foundation
- Family Office Services
- Qualified and Non-qualified Retirement Plans
- Commercial and Private Banking

AMG CAPITAL MANAGEMENT PORTFOLIO STRATEGIES

- Blue Chip Equity
- All-Cap Equity
- Small & Mid-Cap Equity
- Global Dividend
- REIT (Real Estate Investment Trust)
- Energy



National Trust Bank

Corporate Headquarters: Denver

6501 East Belleview Avenue, Suite 400
Englewood, CO 80111
(800) 999-2190
(303) 694-2190
(303) 694-9242 (fax)

Main Banking Office: Boulder

1155 Canyon Boulevard, Suite 310
Boulder, CO 80302
(888) 547-8877
(303) 447-8877
(303) 447-8822 (fax)

Chicago

180 North LaSalle Street, Suite 2925
Chicago, IL 60601
(877) 662-8243
(312) 263-5235
(312) 263-0447 (fax)

Morristown

163 Madison Avenue, Suite 200
Morristown, NJ 07960
(800) 888-2777
(973) 455-0202
(973) 455-7031 (fax)

Virginia Beach

780 Lynnhaven Parkway, Suite 1140
Virginia Beach, VA 23452
(866) 872-9578
(757) 368-4466
(757) 368-2009 (fax)

www.amgnational.com
info@amgnational.com

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History

Our firm dates back to 1972 when we began as a division of an investment bank. Since then, we have evolved into an independent national organization with offices in Denver, Boulder, Chicago, Morristown and Virginia Beach.

- 1972** Earl L. Wright and Michael D. Bergmann, Ph.D establish Asset Management Group (AMG) as a division of a national investment bank. AMG provides objective, comprehensive financial counseling services to senior executives of leading U.S. companies.
- 1975** The founders purchase AMG to become an independent, fee-only firm, thereby reducing potential conflicts of interest.
- 1976** Our firm becomes a registered investment advisor with the Securities and Exchange Commission (SEC) and begins providing specific investment recommendations to clients as part of our extensive counseling services.

Group financial planning services are introduced. These new services offer corporate clients customized group programs on critical financial planning and retirement issues.

We provide clients access to alternative investments to diversify their investment portfolios beyond traditional stock, bond and mutual fund holdings.
- 1979** Tax return preparation services are added. In-house tax specialists prepare tax returns, advise on tax compliance issues and provide tax research to support counseling teams.
- 1981** Earl L. Wright and Michael D. Bergmann establish Asset Management Group Investment Corp. (AMGIC) to expand due diligence and alternative investment offerings to AMG clients.
- 1994** Services expand to provide investment management, which includes a customized AMG investment plan that we can implement for our clients.
- 1995** The AMG Charitable Gift Foundation, a public, non-profit organization, is created to provide clients with a convenient, low-cost alternative to establishing a private foundation. Bill paying and recordkeeping service also introduced.
- 1999** Personal Financial Management (PFM) is introduced to provide clients with a comprehensive, integrated package of financial counseling and discretionary investment management services.
- 2001** We become a national trust bank. AMG and the trust department of Guaranty Bank and Trust create a non-depository, non-lending national trust bank to help clients by providing trust services along with our extensive range of financial management services.
- 2004** We acquire Old Dominion Trust Company to serve affluent individuals and businesses throughout eastern Virginia and to further extend our presence in the eastern U.S.
- 2008** The addition of commercial banking powers granted by the FDIC and the OCC allows AMG National Trust Bank to better serve clients' complete financial needs.