



National Trust Bank

COMPLETE SOLUTIONS FOR MANAGING YOUR FINANCIAL SECURITY AND SUCCESS

AMG National Trust Bank

A LETTER FROM THE FOUNDERS



Earl L. Wright



Michael D. Bergmann, Ph.D.

When you've worked a lifetime to build a business, an institution or personal wealth, cultivating and preserving your assets and creating an enduring legacy are priorities. As the co-founders of AMG National Trust Bank, we've spent more than three decades providing discriminating clients with customized services that enable them to envision their financial future and beyond.

Since 1975, AMG has helped affluent individuals and families, corporate executives, business owners and institutions develop strategies for long-term financial security and success. We offer a full range of investment management, financial counseling, trust administration and private banking services to help clients build, manage and preserve wealth.

When you work with AMG, you benefit from precise customized solutions to help you reach specific goals. In short, because of our breadth of services and depth of expertise, combined with our commitment to independent, objective investment advice, AMG can serve your needs at any point in life.

With five offices across the country and \$2.5 billion in assets under management, we've created a financial organization that can support and guide clients through their lifetime. We'd be honored to help you and your family accomplish more with your wealth.



Earl L. Wright
Chairman and CEO

Michael D. Bergmann, Ph.D.
Senior Executive Vice President
and Chief Economist

COMPREHENSIVE CLIENT SERVICES:

- ⊗ **Personal Financial Management (PFM)** to build a plan to address your entire financial picture, take advantage of your investment opportunities, manage risks and tax liabilities, and protect your assets.
- ⊗ **Financial Counseling** on such critical issues as tax, estate and retirement planning.
- ⊗ **Investment Management** to design and build a well-diversified investment portfolio using “best of breed” mutual funds, separate account managers, AMG portfolio strategies and real estate investment trusts (REITs).
- ⊗ Access to **Private Capital** investments for accredited and qualified investors who want to diversify their portfolios with real estate, energy, hedge funds, private equity and other non-traditional investments.
- ⊗ **Personal Trust Administration** with investment management services for an extensive range of trusts including living, testamentary, irrevocable life insurance, special needs and charitable remainder trusts.
- ⊗ **IRA and 401k Rollover Accounts** that include investment advice, custody services and investment management.
- ⊗ **Tax Return Preparation** for federal, state, local, estate and gift tax returns.
- ⊗ **The AMG Charitable Gift Foundation** for a convenient and low-cost alternative to establishing a private foundation.
- ⊗ **Family Office Services** including end-to-end wealth management services that help you and your family take advantage of investment opportunities, steward your resources and transfer wealth effectively.

- ⊗ **Accounting and Bill-Pay Services** that make managing your affairs convenient and efficient.
- ⊗ **Qualified and Non-Qualified Plans** for employers, including custodial, trustee and investment management services.
- ⊗ **Private and Commercial Banking** for your day-to-day financial needs and for the times when you need the power and resources of a large bank with the personal touch of a small one.

“Because of your assistance in showing me and all of my family various opportunities, you and AMG have helped us to move in a direction that I can feel really proud of. I have accomplished things I could not have done without your help.”

Fritz Trask



AMG NATIONAL TRUST BANK IN THE COMMUNITY

AMG National Trust Bank is committed to corporate giving. Our contributions to the communities in which we live and work help connect us more fully to the people and organizations we serve. By allocating five percent of our pre-tax profits to philanthropic gifts, we proudly support initiatives and organizations that provide high-quality educational and cultural programs.

Through our philanthropic efforts, we help children experience diverse and challenging educational opportunities, regardless of their economic or social background. To that end, we support a variety of worthy organizations including the Colorado Symphony Orchestra, the Colorado Children's Chorale, the Boy Scouts of America, the Colorado Council on Economic Education, The United Way and the Mile High Chapter of the American Red Cross.



CONTACT US

For more than 30 years, AMG National Trust Bank has helped clients achieve long-term financial security and success through comprehensive and strategic financial services. To learn more about the advantages of working with AMG, visit us online at www.amgnational.com.

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