



FACTS & FIGURES

ABOUT US

AMG National Trust Bank is an innovative, independent privately held bank and wealth management firm that leverages broad financial services to tailor solutions to clients and help them create their masterpieces. AMG 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.

FAST FACTS

- Founded in 1972 as a division of a Wall Street investment bank and independently incorporated in 1975
- Granted commercial bank charter in 2008
- Corporate headquarters in Denver; main banking office in Boulder. Other office locations in Cheyenne, Chicago, Morristown and Virginia Beach
- Clients across the United States and overseas
- More than \$4.2 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

- Personal Financial Management
- Financial Counseling
- Investment Management
- Private Capital
- Trust Administration
- Tax Services
- AMG Charitable Gift Foundation
- Commercial and Personal Banking

AMG CAPITAL MANAGEMENT PORTFOLIO STRATEGIES

- Blue Chip Equity
- All-cap Equity
- Small and Mid-cap Equity
- Global Dividend
- International Equity

COMMUNITY

AMG National Trust Bank's contributions to the communities in which we live and work connect us more fully to the people and organizations we serve. To build stronger communities where free enterprise flourishes, AMG partners with organizations that eliminate barriers to educational success for children, enhance common bonds within our community through cultural expression, and/or foster innovation and entrepreneurship.

**Assets under management as of 12/18*

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, Cheyenne, 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, Ph.D 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.
- 2012** We open a trust office in Cheyenne, Wyoming to help clients benefit from the advantages of Wyoming trusts.
- 2015** AMG's corporate headquarters is completed, furthering our commitment to serve clients for generations to come and embodying the strength and permanence of our conviction for our clients' success.

The Dome at AMG provides a conference center and event space to host AMG client and community events that help AMG maintain its tradition of being a thought leader in its field. (www.amgdome.com)

FANUM is created, a founders club that serves as a platform for bringing together serial entrepreneurs who can benefit from one another as well as from AMG (www.fanum.com).

Asset Management Group Investment Corp (AMGIC), rebrands their investment offerings as the Cupola family of investments. A Cupola is the "king of domes;" it traditionally provides light and air. AMGIC sees opportunities that others do not because of the unique perspective brought about by light, height and expertise.

AMG



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"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."