



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 \$4.5 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 3/19*

