Fact Sheet

First National Bank
Investment Management & Trust

Financial Planning

Financial Planning facilitates your life goals through proper management of your finances. By gathering current financial information, defining life goals and priorities and determining a strategy, your plan provides direction and meaning allowing you to understand how each of your decisions affects other areas of your finances.

We don't stop with providing you the plan. We help you implement your plan by coordinating each step of the process and introducing you to other professionals to fulfill your needs along the way.

To create your personal Financial Plan, you will begin by meeting with an Investment Management & Trust professional to discuss the appropriate components of six main areas of planning:

•Budgeting and Savings

•Education Planning

•Estate Planning

•Insurance

•Investment Allocation

•Retirement Planning

We listen closely to ensure that we understand your personal and financial aspirations, time frame, and risk tolerance. Then we meet with you to review a written analysis of your unique needs and recommend an action plan based on the priorities you have identified.

Financial Planning can be accomplished over a period of time, easily accommodating your schedule and decision-making pace. We will lead you through a thoughtful, organized process that results in these benefits:

•Clear analysis of your current financial situation relative to future goals

•A framework to aid in making important financial decisions

•An array of options for accomplishing your objectives

•Better understanding of the implications of your decisions

•An organized approach to managing your finances

Investment Management & Trust Financial Planning experts are experienced in working with individuals and families who value having a strategic plan for reaching their financial and personal goals. We will work with your current advisors and bring in other resources appropriate to ensure that your financial plans are tailored to all of your financial and legal considerations.

For more information on Financial Planning, contact:

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