

Wealth Management

Specialized financial planning at every life stage.

Our Wealth Management Services will help you focus on what is really important to you and develop an action plan to reach your goals. Each life stage has unique challenges and opportunities. By understanding your needs and values and designing strategies with your best interests in mind, we strive to put your hopes and dreams for the future into a result-focused, comprehensive financial plan. Our clients work with us because they trust our local wealth planning professionals to bring true peace of mind and confidence to their financial decisions. We are devoted to building financial success stories one client at a time.

[Financial Management & Trust Services](#)

Rely on our trust professionals to manage your day-to-day finances and tailor your investment portfolio for your financial needs. We will work with you to create an estate plan that protects what is important to you, leaving more time for you to enjoy retirement. Peace of mind for you, peace of mind for your family.

Our staff of nine includes: five full-time trust officers with over 100 years of combined banking experience, three accounting administrators and one administrative assistant with a combined

40 years of banking expertise.

Areas of Expertise: Financial Management, Trustee, Executor, Conservator and Escrow Agent

Here are some examples of situations in which you may want to consider Financial Management & Trust Services.

- Time is important to you; your life would be easier if a professional was managing your day-to-day finances.
- Your elderly or ailing parent will soon require more hands-on attention.
- You are concerned your spouse hasn't been involved with managing your household finances.
- A family member just passed away and you were named executor. Now, you are not sure where to begin.
- You want to make gifts to children and grandchildren to save on estate taxes, but you're not sure how best to accomplish this.
- You are retired and concerned about generating the appropriate income from your investments.

[First Point Financial Management & Trust Services](#) is proud of its local ownership. Local decision making, by the trust officers who work directly with you, provides an important distinction and advantage for you. We would be glad to visit with you in person to answer your questions about how we can best serve your needs.

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