

Private Client Services

CUSTOMIZED WEALTH SOLUTIONS.

Designed exclusively for clients with more complex financial needs, WoodTrust Private Client Services provides an elite level of banking and asset management services. As a private client, clients benefit from direct access to a talented relationship manager offering proactive, responsive insight into the financial services that best fit their needs.

Personalized team understands unique client financial needs.

Holistic approach to financial picture.

Customized products with coordinated access.

Preferred pricing in appreciation of client's loyalty.

Trusted organization serving clients reliably since 1891.



SOLUTIONS. NOT EXCUSES.

Private Client Solutions

Greater personal wealth brings freedom, opportunity, and flexibility. However, this also brings unique complexity to financial affairs. WoodTrust Private Client Services organizes the various components of a financial strategy from day-to-day banking, credit needs, investments and estate planning.

Did you **KNOW?**

WoodTrust prides itself on offering the most technologically advanced products while providing traditional, relationship-based services.

NEXT *Steps...*

To learn more about WoodTrust, or to set up a meeting, please call 715.423.6800, or email info.trust@woodtrust.com.

Professional Trust and Investment Services

- Personalized investment plans and disciplined investment processes
- Access to actively managed investment solutions
- Comprehensive financial planning, trust, and estate services
- Fully-bundled retirement plans for businesses
- Open-architecture insurance and annuity solutions
- Competitive discount brokerage

Customized Credit Alternatives

- Credit cards with Points 2U Rewards Program
- Preferred rates and terms on mortgage and business loans
- Waiver or reduction of origination and processing fees
- Subject to credit approval

Enhanced Deposit Services

- Competitive interest on daily account balances
- Additional interest on Certificates of Deposit
- Unlimited check writing
- Free personal and cashier's checks
- Discounted safe deposit boxes

Secure Automation and Mobility Features

- Free Internet Banking with Bill Pay, expense tracking, check images and downloads to Quicken or Microsoft Money
- ATM and debit cards with Points 2U Rewards Program
- Mobile Banking for iPhone, Android and Blackberry
- Email & text alerts to aid in monitoring account activity
- eStatements