Board of Directors

The Board of Directors oversees Wealth Management because of the department's fiduciary status. With more than 100 years of cumulative investment experience, these Alaskans are the same specialists who guide the bank's own investment decisions and activities.

Betsy Lawer
BOARD CHAIR AND CEO/PRESIDENT

Lucy Mahan
VICE CHAIR - OWNER
TRANSITIONAL COUNSELING, LLC

Admiral Tom Barrett USCG (Ret.)
BUSINESS COMMUNITY MEMBER

John Binkley
CHAIRMAN, GODSPEED INC.

Perry Eaton
LEAD DIRECTOR, ARTIST

Margy Johnson
BUSINESS COMMUNITY MEMBER

Jane Klopfer
BUSINESS COMMUNITY MEMBER

Doug Longacre
FORMER FIRST NATIONAL PRESIDENT
AND BUSINESS COMMUNITY MEMBER

Pat Pitney
PRESIDENT
UNIVERSITY OF ALASKA

Tara Sweeney
OWNER, TACK 71 STRATEGIES

Tom Tougas
OWNER, MAJOR MARINE TOURS

Janet Weiss
BUSINESS COMMUNITY MEMBER

First National Bank
ALASKA

Shaping Tomorrow Since 1922

With more than 100 years of business, First National Bank Alaska has earned the trust of Alaskans by providing valuable banking services to businesses and individuals, and by offering strength, stability and commitment to your success. With shared pride and dedication, we look forward to our next century of business in the Great Land.

Our Wealth Management officers stand ready to answer your questions and discuss customized investment strategies that are right for you or your business.

907-777-4560
WMClientService@FNBAlaska.com
FNBAlaska.com

ABM BEST PLACE to WORK 2016-2022

ABM BEST BANK or CREDIT UNION 2021-2022

Alaska Business magazine "Best of Alaska Business" Awards

TRUST AND INVESTMENT MANAGEMENT SERVICES

Wealth Management

Dear valued customer,

Morgan Neff
WEALTH MANAGEMENT DIRECTOR

Your wealth management needs are unique and you can be confident First National can help you achieve your expectations. As a wealth management client, you will enjoy the benefit of perhaps our bank's most significant asset—100+ years of experience—an asset we will leverage every day as we assist you in reaching your long- and short-term financial goals.

Trust us to anticipate your needs, provide the very best customer service, and work hard every day to deepen your investment management and/or trust relationship with us. Our team of local experts stands ready to help you, whatever your trust or investment management needs may be. We look forward to talking with you.

Sincerely,

Morgan Neff
WEALTH MANAGEMENT DIRECTOR

WEALTH MANAGEMENT
First National Bank Alaska

First National Bank Alaska 907-777-4560 **FNBAlaska.com**

WEALTH MANAGEMENT
First National Bank Alaska

A CUSTOMIZED APPROACH

FINANCIAL PLANNING

INVESTMENT MANAGEMENT

TRUST SERVICES

THE ONE SOLUTION

YOUR GOALS OUR FOCUS

Our local team of experts works with you to define your goals and establish risk and return expectations for your portfolio.

- Short-term liquidity **(0-2 years)**
  Covers all spending and emergency cash needs.
- Medium- to long-term longevity **(2-10 years)**
  Funds future liabilities and lifestyle.
- Long-term legacy **(10 years+)**
  Funds generational and multi-generational lifestyles including charitable and foundational style investing.

PLAN FOR YOUR FUTURE TODAY

We use industry-leading financial planning technology to create a personalized investment strategy to meet your needs.

- Retirement planning
- Cash flow forecasting
- College planning

THE FLEXIBILITY YOU WANT, THE STABILITY YOU NEED

Our open investment platform allows flexibility and ensures objectivity. We implement solutions that have passed the bank's own investment committee's due-diligence process.

- Bank-Directed portfolios
  Your team of local wealth management experts makes investment decisions on your behalf.
- Client-Directed portfolios
  Investment transactions are directed by you.

ESTATE MANAGEMENT SIMPLIFIED

Managing trusts and estate plans can be complex. Our local team of experts can help navigate Alaska's unique asset protection, community property and estate planning challenges.

- A corporate fiduciary
  Trust powers granted by the Office of the Comptroller of the Currency (OCC).
- Estate settlement
  We provide experience and technical expertise in attending to administrative details as well as managing and distributing your assets, according to your wishes.
- Specialty asset management
  We manage illiquid and hard-to-value assets including, but not limited to, LLCs, and promissory notes.

Wealth Management and Trust Committee

These knowledgeable and longtime Alaskans directly oversee the activities and operations of the wealth management team, approving account actions and providing guidance and counsel.

Betsy Lawer
BOARD CHAIR AND CEO/PRESIDENT

Doug Longacre
FORMER FIRST NATIONAL PRESIDENT AND BUSINESS COMMUNITY MEMBER

Admiral Tom Barrett USCG (Ret.)
BOARD MEMBER AND WEALTH MANAGEMENT AND TRUST COMMITTEE CHAIR

Wealth Management Investment Committee

The Wealth Management Investment Committee uses their decades of combined experience to manage asset performance, review financials and strategize the bank's investments.

Cheri Gillian
SENIOR EXECUTIVE OFFICER CHIEF ADMINISTRATIVE OFFICER AND BOARD SECRETARY

Doug Longacre
CHAIR OF COMMITTEE AND BUSINESS COMMUNITY MEMBER

Chad Steadman
SENIOR VICE PRESIDENT AND SENIOR CORPORATE LENDING DIRECTOR

Morgan Neff
WEALTH MANAGEMENT DIRECTOR

Wealth Management Officers

Our Wealth Management officers bring decades of experience to your portfolio management. Our values of responsiveness, integrity and dedication to your success guide everything we do.

Laura Asgari
INVESTMENT MANAGEMENT OFFICER
907.777.4573
LAsgari@FNBAlaska.com

Nichole Kennedy
INVESTMENT MANAGEMENT OFFICER
907.777.4567
NKennedy@FNBAlaska.com

Kara Blake
BUSINESS SUPPORT MANAGER
907.777.4564
KBlake@FNBAlaska.com

Evert McDowell
TRUST ACCOUNT ADMINISTRATOR AND WEALTH MANAGEMENT OFFICER
907.777.4574
EMcDowell@FNBAlaska.com