



See how extraordinary private banking can be



You've earned the right to bank this way



A clearly superior banking experience

When you are fortunate enough to live a life of abundance, the selection of financial partners requires discernment. You need and deserve the utmost in integrity, security and discretion. Time is a precious commodity, compelling higher levels of service and convenience. What's more, your unique banking needs extend well beyond standardized transactions, putting a premium on creativity, expertise and flexibility.

These days, it is nearly impossible to find a bank that even acknowledges your particular requirements, much less rises to the challenge of satisfying them. Increasingly, you are pushed to impersonal 800 numbers, cookie-cutter products and self-service channels — then charged endless fees.

Instead, don't you deserve an ongoing, personal relationship with a highly attentive, trusted banker? A valued partner who fully supports you in building, maintaining and protecting your financial legacy?

That is exactly what you will enjoy at First Private Bank.

Introducing First Private Bank

Dallas-based First Private Bank was founded with a singular mission: Provide an extraordinary private banking experience to a select group of affluent clients who require the ultimate in one-on-one service. Our founders bring decades of diverse banking expertise gained as senior executives of major financial institutions and leading private banks. Our core team has been together more than 20 years, and is well known and respected in the Dallas community.

First Private Bank offers a full spectrum of highly customized personal and business banking services, delivered seamlessly for unparalleled convenience. We get to know you, your family and your business, so we can anticipate your needs and work proactively to lighten your load, save you time, and help you achieve your goals. We make a difference in our clients' lives by making banking effortless.

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Highly attentive, highly individualized

It is one thing to promise attentive, responsive service. It is quite another to deliver consistently on that promise. Here is how we do it:

You will experience the comfort of dealing with the same private banker rather than a revolving door of faces. We customize transactions and products to your particular preferences and needs. You define how you want to do business with your private banker — in person, by phone, by email. And we even offer a mobile banker on call for special requests.

Know that when you call First Private Bank you will reach a live person who can help you — you will not spend a lifetime on hold, or be sent to voice mail or an 800 number. We are always ready to assist you, redefining the concept of “bankers’ hours.”

Our Services

Deposit Services

First Private Bank offers a full complement of preferential accounts and services to address your specific personal and business requirements. Your private banker will help you select and set up your accounts, and assist you with arrangements, questions and transactions. We offer:

- n Private Interest Checking
- n Private Business Checking
- n Money Market Accounts
- n Certificates of Deposit (CDs)
- n Individual Retirement Accounts (IRAs)
- n Safety Deposit Boxes

Loan Services

When you are ready to move on an opportunity, you need bankers who will smooth the way — not create hurdles. Unlike banks that subject their customers to convoluted approval hierarchies, rigid underwriting templates and laborious back-and-forth processes, we make the loan experience remarkably simple and accommodating.

At First Private Bank, count on a timely, personally tailored, creative solution. You will receive a faster loan decision because we keep the application review and approval in-house. In addition, we retain and service our own loans, offering you the flexibility to request modifications or reduce principal without a hassle. And it is easier to obtain fast, complete, accurate information. We offer:

- Residential Mortgage Loans
- Personal Loans and Lines of Credit
- Investment Lines of Credit
- Business Loans
- Business Investment Loans
- Letters of Credit

Services of Convenience

First Private Online Banking

When your private banker sets up your accounts, you can choose to include online banking for anytime, anywhere account access. First Private Online Banking is not accessible to the public, so it is extra-secure and efficient. Here is what you can do online:

- View your accounts — pull up account history, statements and check images
- Manage your accounts — transfer funds between accounts; check balances
- Download transactions to financial software
- Download statements to your computer
- Make loan payments
- Make stop-payment requests
- Pay bills electronically

Mobile Banking Services

When time, security and discretion are of the essence, our bankers are available to accommodate your special requests, such as delivering cash and currency, picking up deposits and transporting financial documentation. You can arrange for this courtesy service simply by contacting your private banker.

Card Services

For ready access to your account around the corner or around the world, First Private Bank offers ATM and VISA® debit cards that make it easy to obtain cash when you need it. We will provide you with a personal identification number (PIN) to access cash at any automated teller machine. The VISA debit card may be used to make a purchase wherever VISA cards are accepted. VISA credit cards for personal or business use are also available.

Concierge Services

First Private Bank clients enjoy a thoughtful array of additional time-saving services:

- Wire transfers
- Notary services
- Foreign currency exchange and travelers’ checks
- Domestic and international collection services
- Guidance in financial matters

For assistance with any of these services — or for any question or concern, personal or business — simply contact your private banker.

Know that when you call First Private Bank you will reach a live person who can help you — you will not spend a lifetime on hold, or be sent to voice mail or an 800 number.

When time, security and discretion are of the essence, our bankers are available to accommodate your special requests, such as delivering cash and currency, picking up deposits and transporting financial documentation.

Guarding your best interests

We help you identify the options and products that are best for you. Because our bankers are dedicated to such a small client base, they can pay meticulous attention to each client's account activity, as well as trend data and environmental factors. So they may recommend a better way to do business, such as enhancing or altering a product or process. And, we can act quickly to assist you if you feel your account information has been compromised.

Think of First Private Bank as an indispensable resource to your family and business. We are here to support you in all your endeavors. At your direction, we will work closely with your accountants, bookkeepers, investment bankers and other trusted advisors to ease the burden of dealing with multiple players. You will also find your private banker a valuable ally in reviewing solicitations and opportunities presented by other financial services providers.

A better experience right from the beginning

Let First Private Bank show you the advantages reserved for our private clients. We make it incredibly simple to get started, too. Unlike other banks that make you do most of the work, we execute the documentation and oversee the entire process for you. You will enjoy an uncompromising standard of service and convenience that provides peace of mind and enhances your lifestyle.

We invite you to experience the benefits that await you at First Private Bank. Simply give us a call or arrange a one-on-one visit at your convenience and see how extraordinary private banking can be.

First Private Bank

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Business Card



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