

Services & Core Values

INVESTMENT MANAGEMENT*

Our portfolio managers and financial advisors work closely with our clients to provide objective and sophisticated investment strategies to meet their long-term financial goals.

We offer:

- Discretionary Portfolio Management
- Investment Consulting Services
- Brokerage Services*

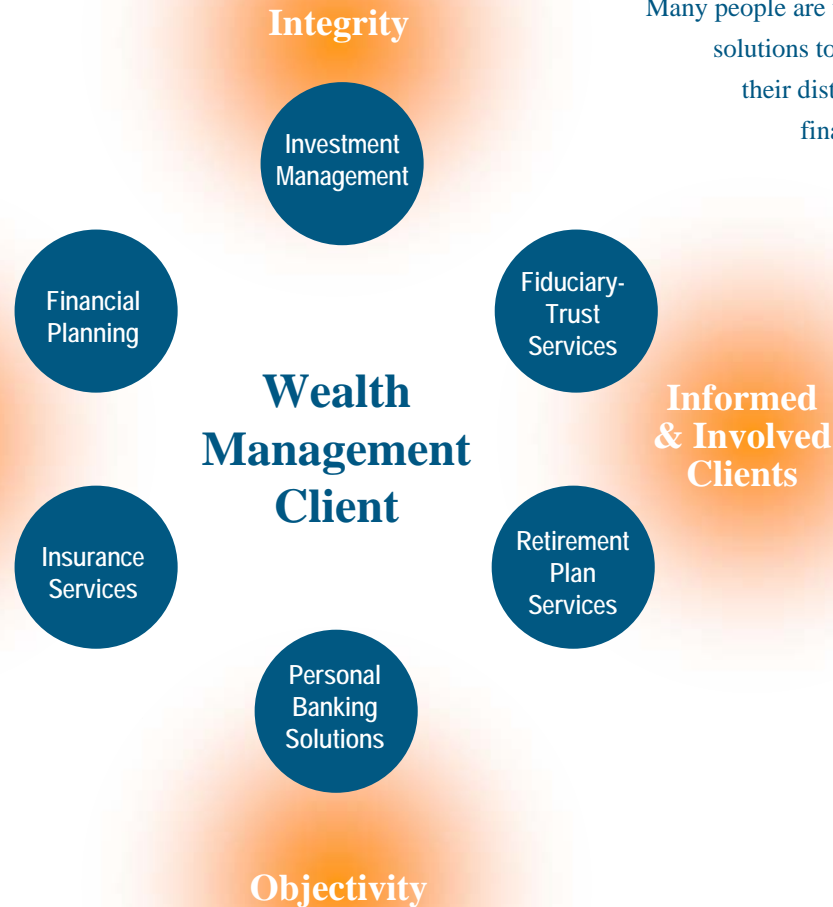
FINANCIAL PLANNING

The importance of planning for your financial future is immeasurable. We work closely with you to identify and plan for your financial needs. Together we develop a comprehensive financial strategy that addresses your needs and includes: Estate Planning, Retirement Planning, Tax Planning, Insurance Planning, and Investment Planning. One of our specialties is offering financial planning specifically focused on the unique needs and opportunities of business owners.

INSURANCE SERVICES*

Creating the best portfolio of insurance products is important when developing a comprehensive financial or estate plan. Our advisors can perform a review of your current insurance to help determine if you have adequate coverage and then identify the best products to suit your needs.

**Professional
Competence**



FIDUCIARY & TRUST SERVICES

Many people are unaware that trusts provide reasonably simple solutions to managing and protecting financial assets and their distribution. Sometimes this means managing the financial affairs for an individual unable to do so for themselves, or utilizing trusts to handle complex family situations. Trusts can also minimize the effects of estate taxes as assets are transferred from one generation to the next. We service a wide range of trusts, including Revocable, Irrevocable, Charitable, Special Needs, and Guardianships.

RETIREMENT PLAN SERVICES

First National Wealth Management offers a wide array of retirement services for individuals, businesses, and organizations. These services include acting as administrator, investment manager, and trustee for qualified retirement plans including: 401(k), profit sharing, and pension plans.

PERSONAL BANKING SOLUTIONS

Through First National Wealth Management you also have access to Personal Banking Solutions from First National Bank of Chester County. Serving the community since 1863, First National Bank of Chester County delivers the products and services to fit individuals, businesses, and organizations. Whether you need deposit services, cash management, personal or commercial lending, First National Wealth Management will draw upon the considerable resources First National Bank of Chester County has to offer to provide you with the personal service, flexibility, and timely response you deserve.