



Warren Financial
Investing for a Greater Purpose[®]



Warren Financial Private Banking



At Warren Financial, we find truth in the idea that you can achieve your financial goals when you have a Greater Purpose in mind, going beyond just financial security. Our mission is clear: to assist our clients in achieving their financial objectives so that they can achieve their Greater Purpose. Our commitment in this process is to place fiduciary responsibility above all else.

Warren Private Banking can help you achieve your objectives, both business and personal.

High Touch, Personal Service

Immediate Support

Regular “on-track” meetings

- 1) **High Touch, Personal Service:** Private Banking is all about high touch and personal service. That’s why we focus our attention on you via your own personal relationship manager.
- 2) **Immediate Support:** Warren Financial provides nearly instant communications with an experienced portfolio manager or relationship manager. Our high touch, high service approach demands nothing less. Our website CHAT feature connects you instantly. Although

- everyone likes the idea of a “team” approach, when you need an answer, you certainly don’t want some automated web-bot.
- 3) **Regular “on-track” meetings:** Your plans. Your goals. We like to meet regularly with our clients to be sure everyone is on the same page (every 3-6 months). Automate your appointment on a recurring basis, through your relationship manager, or directly from the Warren Financial loyalty iPhone app.

Service isn’t about platitudes, it’s about attitudes.



Service requires

1. Attention to detail
2. Commitment to achieve the goal
3. Dedication to the customer

What do the best service companies have in common?

To learn more about Warren Financial, please visit www.WarrenFinancial.com



Why Warren Private Banking:

- 1. Service.** High touch, high service. Warren Financial is not a bank. Warren Financial is a registered investment advisory firm that is dedicated to helping our clients achieve their objectives. It's all about "service". It requires attention to detail, dedication, and experience to meet your goals. Our commitment and resources are dedicated to help meet the needs of sophisticated investors.
- 2. Seamless Experience.** You are already comfortable working with your Warren relationship manager, as well as accessing all the other resources available, such as economic data, conviction buy lists, private equity, customized portfolios, etc. Using Warren Financial Private Banking services simply means that your current relationship manager will be your quarterback, ensuring that your banking needs are taken care of by one of our private banks (we work with 4 private banks). "Seamless" means that we don't hand you off. However, we do pull-in the right resources to handle your lending needs at just the right time.
- 3. Technology that has a Purpose.** Tech and digital platforms should provide value or else they just waste your time.
 - a) Obviously 24x7 portfolio access.
 - b) Our exclusive iPhone Warren Financial Loyalty app where clients can check their plan status, keep up with important bulletins from Warren Financial, maintain our Forbes articles, CNBC clips, and other social media contributions. But also earn loyalty points on the way to meeting your goals, then redeem those points for discounts and other rewards.

Warren Financial Private Banking

Don't leave RATES up in the air...

- ✓ Better rates
- ✓ Tax efficiency
- ✓ Simplified, streamlined loan acquisition process (we do the work for you)
- ✓ Easily roll over your account from big box vendors such as Morgan or Merrill to Warren – we will rework your loan, paying off the old and getting you a great rate as a replacement loan.
- ✓ Coordination and initiation. You can setup a standing loan ready to go before you need it, so that later when you want it, it will be readily available.
- ✓ Personalization. It stands to reason that a personalized, customized service can't simply be procured by figuring out which pigeon hole you fit into.
- ✓ Loan using your joint or individual account portfolio as collateral (IRA accounts are not eligible by IRS rule). Use the money for whatever you want: to remodel the kitchen, buy a car, bridge loan, etc.
- ✓ Loan using the cash value in your insurance policies as collateral. Use the money for whatever you want: to remodel the kitchen, buy a car, bridge loan, etc.
- ✓ Other types of loans also available, loans using as collateral a boat, plane, beach house, or other asset are also available, but may be at slightly higher rates compared to using your investments as collateral.



As a client of the Warren Financial Private Bank, you have access to Cash Management solutions far beyond anything offered by the big box private bankers.

Warren Financial offers you a personalized Chief Financial Officer. Beyond just coordinating and organizing, your Warren Financial CFO will get your cash management affairs in order by paying your bills for you.... For a week, a month, or as long as it takes for you to regain control of your business or personal cash flows. This consulting service isn't free, nor is it included in your other Warren Financial services, but sometimes, it's just exactly what you need.

Personal or Business CFO

- Bill payment
- Bank & credit card statement reconciliation
- Organizing monthly financial statements
- Payroll strategy and organization
- Budgeting
- Tax planning and filing
- Trust accounting



Warren Financial
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Warren Private Banking provides that unique personal touch.

Don't bother shopping, gathering tax returns, filling out forms at your bank..... Let Warren Financial handle it all for you.



High Touch

Personal Service

Completely custom to your needs



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Investing for a Greater Purpose®



*Partner, C-suite executive, Entrepreneur, or high net worth investor
Let Warren Financial help you achieve your goals by bringing you the Private Banking and
investing relationship you expected from the other bigger firms. We are large enough to
bring you world class deals and experience but small enough not to force fit you into
products and categories.*

610-363-2000
www.WarrenFinancial.com



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