PRIVATE BANKING

PagnatoKarp CRESSET

Boutique private banking solutions.

Private Banking

Dedicated Private Relationship Specialist on call to execute your portfolio's day-to-day administration activities:

- Custom banking relationship
- Complex portfolio transfer and asset implementation experience
- Access to exclusive Fidelity Family Office and other custodians
- Access to, and assistance with, trustee services
- Institutional cash management
- Tax document facilitation
- Secure, cloud-based document storage via your True Fiduciary® Vault

Cash management, including facilitating:

- Tax and insurance policy premiums payments
- Coordination with outside banking relationships
- Domestic and international transfers

Lending

Sophisticated financing solutions:

- Prominent lending facilities
- Preferred lending rates

Private Investment Administration

Dedicated Private Relationship Specialist to administer activities for your portfolio's private investments:

- Custom reporting
- Electronic subscription service
- Capital call facilitation

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