



FIRST REPUBLIC BANK

It's a privilege to serve youSM

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WWW.FIRSTREPUBLIC.COM • 212.259.4000

Extraordinary Service, In an Extraordinary Way

Our Firm

First Republic Bank is a full-service bank and private wealth management firm built the old fashioned way—with client service at the forefront. At the foundation of this model is a team that is universally committed to the goal of exceptional service.

Our Services

First Republic Private Wealth Management encompasses First Republic Investment Management, First Republic Securities Company and First Republic Trust Company. As a company, we deliver customized investment advice and solutions to a wide range of clients. Our investment professionals are committed to recommending an appropriate investment strategy for every individual and to helping clients meet their investment goals.

We are one of the country's premier private banks, offering full service private and business banking services and products. Our private bankers and wealth managers work together to bring enhanced value to all of our clients.

Our Clients

The First Republic client base is comprised of high net worth individuals, families, foundations, endowments, non-profits, trusts, businesses and other organizations. Sixty five senior investment professionals including portfolio managers, trust officers, investment consultants and business development officers manage over 7,000 wealth management relationships and \$16 billion Total Assets Under Management as of December 31, 2009. Our goals are solely aligned with meeting client investment objectives.

Our Unique Features

Whether the client is looking to diversify a concentrated position, needs guidance on a liquidity event, is investing for the first time, or is looking to analyze an existing portfolio, we have the solution for their needs. Our brokerage services include advised and self-directed brokerage accounts, our investment management professionals provide customized client portfolios that meet a broad range of needs and investment styles, and trust officers serve as Trustee for multiple styles of trusts (including real estate holdings). Each client receives a customized investment

AT A GLANCE

Our Mission: To listen and understand the needs of our clients, provide diverse "best of breed" investment alternatives, and deliver an unparalleled level of service.

Services: Private Banking, Wealth Management, Trust Services, Brokerage, and Investment Management.

Office Locations: California: San Francisco, Palo Alto, Walnut Creek, Los Angeles, Santa Barbara, San Diego; Northwest: Portland, Seattle; Northeast: New York, Greenwich, Boston
Hawaii: Honolulu

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policy statement, asset allocation strategy and is served by a dedicated team of professionals.

Our Strengths

At First Republic we continually raise the bar on service to ensure that clients' expectations are exceeded and new, ever higher standards are consistently met. We offer unbiased and fully transparent investment counsel providing strategic and tactical asset allocation, portfolio construction and performance monitoring and reporting. Thorough due diligence is performed when selecting third party investment managers and mutual funds. Our client portfolios are well diversified, multi-asset class portfolios that include traditional equity and fixed income managers, as well as alternative investment strategies such as hedge funds, real estate, commodities and private equity. Investment professionals coordinate with outside tax and legal advisors to provide tax sensitive management to portfolios.

A Little-Known Fact About Our Firm

First Republic Investment Management has been serving clients for 86 years; in June 2007, Trainer Wortham & Company (founded in 1924 and a former subsidiary of First Republic Bank) and Starbuck Tissdale (founded in 1933 and a former subsidiary of First Republic Bank) united to form First Republic Investment Management.