



Burke & Herbert
Private Banking

Explore Our Capabilities

**PRIVATE BANKING AT
BURKE & HERBERT BANK**

**ENJOY EXCLUSIVE SERVICE
AND SPECIAL BENEFITS**

**LET US HELP YOU
GET STARTED**

**MEET YOUR
PRIVATE BANKER**

PRIVATE BANKING AT BURKE & HERBERT BANK



Thank you for your interest in Burke & Herbert Private Banking. We know that you have worked hard to achieve financial success, and we believe you deserve a banking relationship that gives you the personalized attention and hands-on expertise that you deserve in all matters relating to your financial needs.

Burke & Herbert Private Banking is designed exclusively for high-net-worth clients who have a minimum of \$1 million in deposits and/or investments at the Bank, \$500,000 of which must be in qualifying investment accounts. As a Private Banking client, you'll build a relationship with your own Private Banker, who will take the time to assess your financial priorities – from everyday banking to the major life goals you may have for yourself and your loved ones. Your Private Banker will provide dedicated service for all of your banking needs.

You'll also work directly with our tight-knit team of financial professionals, knowing that our foremost investment specialists, financial planners, and trust advisors will always be available to you. Above all, you'll find that it's easy to ask any question and express any concern, because Private Banking at Burke & Herbert Bank is a comfortable, collaborative experience where your ongoing success and satisfaction is our sole focus, and no client is more important than you.

If you're ready to expect more from your financial relationship, then it's time to put your trust in the personalized attention and the hands-on expertise that are the hallmarks of Private Banking at Burke & Herbert Bank.



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Member FDIC. Bank deposits are FDIC insured. Investments made are:
Not insured by FDIC or Any Other Government Agency • Not Bank Guaranteed • Not Bank Deposits or Obligations • May Lose Value



703.684.1655 • burkeandherbertbank.com



ENJOY EXCLUSIVE SERVICE AND SPECIAL BENEFITS



PERSONALLY TAILORED SERVICES

- Dedicated services of your own Private Banker to handle all your banking and financial needs
- Complimentary in-depth financial plan and review with a wealth specialist
- Access to qualified professionals with prestigious CERTIFIED FINANCIAL PLANNER™ (CFP®) credentials

PREFERRED PRICING

- Private Banking Interest Checking Account with no monthly or transaction fees, free ATM transactions nationwide, including rebates of fees charged by ATM owners, and free Private Banking wallet-style checks
- Private Banking Super Money Market Account earning our top-tier rate, regardless of balance
- Up to three no-fee outgoing and incoming wire transfers per month to or from your Private Banking Interest Checking Account
- Preferred pricing on a Home Equity Line of Credit
- Preferred pricing on a Personal Line of Credit for overdraft protection
- Safe deposit box with no annual fee

SUPERIOR BENEFITS

- Private Banking Visa® Debit Card with our highest purchase and withdrawal limits
- Visa® Signature Card featuring higher credit lines and outstanding benefits
- Our highest limits on Mobile Banking deposits
- Access to securities-based borrowing for additional financial flexibility



Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and federally registered CFP (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

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We'd love to help you discover how Burke & Herbert Private Banking can improve your banking relationship and help you reach your financial goals.

To get started, your Private Banker will create a complete financial profile for you, which will enable us to develop an appropriate financial strategy with you and perform services on your behalf. To create your financial profile, we will explore your financial needs and priorities, and complete an inventory of your assets and liabilities. Your Private Banker will work with you to gather the information needed. All information that may be requested, such as tax returns, pay statements, investment statements, retirement statements and other documents, will be treated with complete confidentiality.

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To qualify for the personalized assistance, expert guidance and exclusive benefits of Burke & Herbert Private Banking, clients will need a minimum of \$1 million in deposits and/or investments at the Bank, \$500,000 of which must be in qualifying investment accounts. When you become a Private Banking client, you'll have a Private Banking Interest Checking Account and gain access to the full suite of Private Banking product and service benefits.



H.B. SWOOPE, V

Senior Vice President



Delivering an elite level of service and expertise to our private banking clients is the overall mission of Burke & Herbert Private Banking and the specific goal of Private Banker, H.B. Swoope.

With nearly 20 years of banking and financial services experience, H.B. Swoope brings a wealth of knowledge and expertise to his private banking role. His experience includes more than 10 years at Burke & Herbert Bank in a business development and customer relationship management role. In addition to his vast knowledge of financial matters and in-depth knowledge of Burke & Herbert Bank, he has a passion for helping individuals, families, and businesses throughout our local community achieve their goals and dreams.

H.B. will work hard for you and listen carefully to understand your needs. Working with our team of financial professionals, he'll develop a plan to help you achieve your objectives and serve as your advocate and advisor.

H.B. is a graduate of Pennsylvania State University and a long-time resident of and former business owner in northern Virginia.

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