# *First National Wealth Management*
# *A Division of First National Bank of Chester County*
# *Private Wealth Planning*

First National Wealth Management is a team of dedicated, credentialed and experienced financial professionals committed to delivering high quality wealth management services objectively and with integrity to high net worth individuals and institutions.

"At First National Wealth Management our professionals have the sophistication and knowledge you need and the integrity you expect from community bankers," said Clay T. Henry, Executive Vice President of First National Wealth Management. First National's Wealth Management services include: investment management, fiduciary and trust services, retirement planning, insurance services, personal banking solutions, and financial planning. Most recently we have enhanced our financial planning capabilities and formed our Private Wealth Planning team.

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Those qualities of sophistication, objectivity, and integrity are evident in the Private Wealth Planning team at First National Wealth Management. Private Wealth Planning is a solutions driven approach to protecting, growing, and optimizing the wealth of families and individuals. James E. Quillen, CFP® and Senior Vice President is the Director of Private Wealth Planning and has extensive experience in the investment and financial planning fields, including leadership positions within the planning group of a large mutual fund company and the wealth management division of a regional bank.

"Jim, and his team which includes a Chartered Financial Analyst (CFA®) overseeing the investment side, a Certified Public Accountant (CPA®) providing tax expertise, and a Certified Trust and Financial Advisor (CTFA®) for fiduciary matters, as well as a number of Certified Financial Planners (CFPs®), bring a very personal, objective and comprehensive approach to planning," Mr. Henry said. "Together, they possess the skills and expertise necessary to understand and advise on all aspects of a customer's financial life." For today's high net worth individuals this multi-disciplinary approach is critical. Successful planning calls for a team that has depth and knowledge in such diverse areas as insurance, alternative investments, fiduciary services, option optimization strategies, retirement planning, estate planning, and tax strategies. The First National team does, and because of its broad capabilities, brings an approach to "Private Wealth Planning" that is objective and pragmatic; ensuring the right tool gets used for the right job, and all components of a client's financial plan fit together.

Members of the First National Wealth Management team are dedicated to building long-term relationships with clients. The process begins with listening to the client's needs and concerns. Input and participation by clients are vital contributions to constructing a plan that will reach their financial goals. The focus of First National Wealth Management is always on finding the best, most efficient solutions for clients.

"First National Wealth Management is quickly growing into the premier Wealth Management organization in Chester County and beyond," John A. Featherman III, Chairman and CEO of First National Bank of Chester County said. "Our professionals are based in Chester County because we believe that being available and accessible to our clients, their families, and participating in their communities is fundamental to delivering Wealth Management services successfully. Our Private Wealth Planning team epitomizes that approach."

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*Pictured: (left to right) Betsy Hindman; Karen Stahl CPA®, CTFA®; Thomas Corcimiglia CFP®; James Quillen CFP®; Lynn Mander CFA®, CFP®; Stephen McGann; Rebecca Tucci*
*Photography by: Scott Rowan*