



## **Seattle Bank Partners with Local Independent Wealth Advisor Firm to Meet Their Banking Needs**

A 15-year old registered independent advisor (RIA) firm based in Seattle came to Seattle Bank seeking a strategic banking partner. The firm, with approximately \$1 billion of assets under management, was looking for a bank that would not only meet the operating needs of the firm and provide private banking services for its principals, but also would help it achieve succession planning objectives by providing financing to partners seeking to purchase additional shares in the firm.

Seattle Bank routinely partners with RIAs, serving both the firm and shared clients. Working with management of the firm, our team provided treasury management services and a line of credit. Additionally, we established private banking services and bank loans to assist with partner buy-in loans.

At Seattle Bank, we pride ourselves on providing unique, boutique bank services to meet our client's needs.

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Seattle Bank is a boutique bank focused on the needs of individuals, businesses and business owners throughout the Pacific Northwest. Our experienced team of bankers create value by aligning tailored financial resources and services to match each clients' needs. Through a combination of customized solutions, exceptional service and accelerated answers from local decision-makers, we make the complex simple.

**Seattle Bank. Built for you.**



Built for you



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