



Collaboration Results in Full Balance Sheet Solutions for Family

Seattle Bank became the bank of a Seattle family who recently moved their wealth management relationship from a large bank to a local Registered Independent Advisory (“RIA”) firm. The RIA introduced Seattle Bank to provide the client full private banking services, resulting in a true full balance sheet solution for the family.

Brian Goulet, SVP & Relationship Manager partnered with Jean Ciesynski, SVP, Deposit & Treasury Executive to provide the tailored solutions and personal relationship the family and RIA desired. The private banking proposal addressed an array of needs which are typical of our clients, including: Multiple trust and LLC accounts as well as the establishment of direct deposits and recurring bill payments.

This is another example of how Seattle Bank collaborates with RIA’s to support mutual clients.

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 blends big-bank solutions with boutique-bank service – creating more value by aligning tailored financial resources and services to match each client’s needs. Through a combination of customized solutions, exceptional service and accelerated answers from local decision-makers, we make the complex simple.



Built for you

