WASHINGTON TRUST
Wealth Management®

Your complete wealth story

Your wealth story is as unique as you are

You're an individual with a story all your own. It's time you had a wealth manager who understands and respects that.

It starts with planning

At Washington Trust Wealth Management, planning is in our DNA. It sets the stage for everything else we do for you. Our holistic view helps empower your goals through a sophisticated approach to financial planning, investing, banking and lending, fiduciary services, and insurance planning.





Planning for your future

- FINANCIAL PLANNING
- INVESTMENT MANAGEMENT
- TRUSTS AND ESTATES
- PERSONAL BANKING AND LENDING

We believe the best wealth plans are collaborative, comprehensive, and coordinated — designed to help meet your immediate needs, prepare for the future, and minimize risks. We work with you to craft a strategy that is actionable and dynamic, continually evolving to address the changes in your life.

INVESTMENT MANAGEMENT

Growing your wealth

When it comes to protecting and growing your wealth, we don't believe one investment approach is right for everyone. Through our comprehensive goals-based planning process, we construct customized portfolios designed around your personal needs for wealth preservation, growth, risk management, and liquidity.

Our core investment principles:

Financial planning strategy designed to address your unique goals

Asset allocation based on your full investment picture

Portfolio construction utilizing individual securities and leading third-party managers

Tax-efficient adjustments to new client portfolios

Ongoing monitoring and measurement against expectations

Proactive communications and reporting

Building your legacy

Your goals may be to help sustain your family's wealth across generations, support causes or institutions you care deeply about, or to ensure a loved one with special needs will always have the care they need. Your decisions must consider the emotional as well as the practical consequences of each alternative. As part of a financial institution with a long history, we have the expertise and dedicated resources to help you build an enduring legacy.

- Trust services and administration
- Gifting and philanthropic strategies
- Estate settlement and administration
- Business succession planning
- Special needs

Helping you care for the ones you love

We all have people, places, and things we hold dear to our hearts. Want to help your alma mater build a new library? Thinking it's time for your children to take over the business? Planning for the care of a loved one? We can answer all your questions and help you put ideas into action.

Funding your lifestyle

You should expect more from your wealth manager. That's why we offer a full suite of special banking and lending solutions, discounted rates, and digital banking tools, all designed to enhance your Washington Trust Wealth Management experience. It's part of our commitment to address your complete wealth story.

- Special rates on mortgages and HELOCs
- Securities-based lending solutions
- Residential construction & land loans
- Premium checking accounts
- Money market, CDs and savings accounts
- Debit cards
- Online & mobile banking, bill pay, and e-billing

For wherever you want to go

Do you have a special place? Or is the journey what's special to you? We understand either way and will help you get there.

A history of growth

Washington Trust Wealth Management is one of the region's premier wealth management groups, providing client-focused financial solutions to individuals, families, foundations, endowments, municipalities, and businesses for more than a century. Through both organic growth and strategic acquisitions, we have developed a unique approach to holistic wealth management that includes customized financial planning, broad investment management capabilities, and full trust services.

Connect with a wealth advisor today

Call 800-582-1076 or visit us at washtrustwealth.com

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