



*First Point hosts a long weekend getaway to Door County, Wisconsin*

## IN THIS EDITION

Financial Management Services Seminar • Service Highlights • Travel & Social

## YOUR PRIVATE BANKING TEAM



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# BANK THE KNOWLEDGE

## Financial Management Services

In each stage of your life, you are faced with a unique set of challenges and opportunities concerning your finances. At First Point Wealth Management, we specialize in helping you prepare for the unexpected by developing a plan to help you reach your financial goals. Our comprehensive approach to Financial Management Services provides you peace of mind knowing all of your financial concerns are covered.

### Do you see yourself in one of these situations?

- Time is important; your life would be easier if a professional were managing your day-to-day finances.
- You have been assisting your aging parents with managing their finances, and it is becoming overwhelming.
- If something happens to you unexpectedly, is your spouse prepared to manage the finances?
- A family member recently passed away and you were named executor. You are feeling unsure if you want to serve in that role.

At this seminar, we will discuss the benefits of our team approach we use in providing Financial Management Services for our clients including:

- Financial Planning
- Professional Investment Portfolio Management
- Retirement Distribution Planning
- Cash Flow Management
- Paying Bills (property taxes, income tax estimates, utility bills, medical bills, etc.)
- Coordinate Income Tax Preparation
- Charitable Giving Strategies
- Wealth Transfer-Estate Planning



# WEALTH MANAGEMENT

## Financial Management Services Seminar — *Don Rahn, CFP®*

Educational seminars are a popular First Point benefit. We are now offering each topic in the markets we serve. Please register for the date and location that works best for you!

### **Wednesday, October 31**

11:30 AM – 1:00 PM

First National Bank, Ames  
405 5th Street

### **Thursday, November 8**

11:30 AM – 1:00 PM

First National Bank, Ankeny  
1205 N Ankeny Boulevard

### **Tuesday, November 6**

11:30 AM – 1:00 PM

First National Bank, West Des Moines  
5625 Mills Civic Parkway

### **Tuesday, November 13**

10:00 – 11:30 AM

Green Hills Retirement Community, Ames  
2205 Green Hills Drive

*If any of these times do not work for you we would be happy to set up a personal appointment to discuss your financial needs.*



### **Donald L. Rahn, CFP®**

Vice President & Senior Wealth Management Advisor  
515-663-3078  
Don.Rahn@FNB247.com

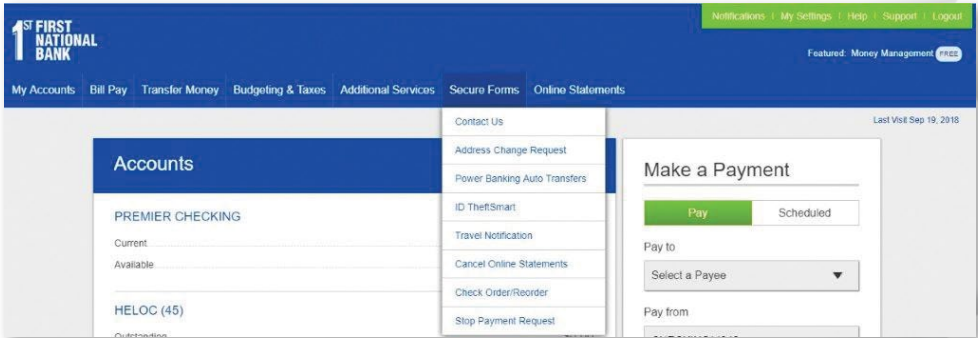
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# SERVICE HIGHLIGHTS

## Secure Forms

One of the goals of First National Bank is to enhance your online access through our digital services. For years, Online Banking has had secure requests, such as address changes or Power Banking auto-transfers. We've also had a Contact Us form to submit online requests or to ask account questions. Recently, we've added three more secure forms through Online Banking which will offer improved access to our services:

1. Travel Notifications
2. Stop Payment Requests
3. Check Orders/Reorder



After you login to Online Banking, you can hover over the Secure Forms tab to see all the forms available for use. So let's say you've got an upcoming vacation and you want to ensure your debit card works while you travel. You can now login to your Online Banking, click on the Travel Notification and supply us with the dates and destinations of your trip. That's it! We'll receive the request, put the travel notice on your account, and email or call to confirm the process is complete.

At First National Bank, we're always looking for ways to make gaining access to your accounts and services as easy and secure as possible. We plan to add more secure forms to make your experience what banking should be.

## Preferred Certificate of Deposit Rates:

As a First Point client, you have the opportunity to take advantage of Preferred CD Rates. Contact your Private Banker to learn more about special rate information on renewing or new CDs.



# FIRST POINT ESCAPES

## Door County Trip Highlights



Dancing Horses Theatre



Door County Fish Boil



Wine and cheese pairing at Egg Harbor



Washington Island



Washington Island cherry train tour



So many delicious cherry desserts!

# GET CRAFTY WITH FIRST POINT

Join us at the all new DIY AR Workshop and get a head start on the holidays. Enjoy wine and hors d'oeuvres while painting with your First Point friends. Ask your Private Banker about project options.

**Thursday, November 1 • 6 – 9 PM**

**Price: \$70 | RSVP by October 26th**



AR Workshop® is a boutique DIY studio that offers hands-on classes for creating custom, charming home decor from raw materials. We provide all materials and instruction. Join an instructor-led workshop where you can customize your project with your choice of stains, colors & techniques. AR Workshop® will help you take your home decor to the next level and have fun while creating it!



1631 SW Main St Ste 104, Ankeny

# FIRST POINT ESCAPES

## Thank you for joining us!

In 2018, we had over 1,000 clients attend our First Point events. We look forward to many more in 2019.



ISU Football Tailgate (Fall)



ISU Basketball Game Watch (Winter)



Des Moines Art Festival (June)



Center Grove Event (Fall)



Client Appreciation (Summer)

## We need your input for social and travel ideas.

Visit us online at [www.FNB247.com/personal/first-point-travel-survey](http://www.FNB247.com/personal/first-point-travel-survey) and click on the survey link. Or, simply call or email your Private Banker and provide feedback on your travel preferences. We look forward to hearing from you.



# FIRST POINT ESCAPES

UPCOMING HOLIDAY SHOWS

## CY STEPHENS

### Kenny G

November 28, 8 PM

Price \$89.50

### Noël

November 30, 7:30 PM

Price \$60

### Nutcracker

December 8, 1:30 & 7:30 PM

December 9, 1:30 PM

Price \$20

### Home Free Christmas

December 16, 7:30 PM

Price \$59.50

### Charlie Brown Christmas

December 23, 3:30 PM

Price: \$48

## DES MOINES COMMUNITY PLAYHOUSE

### The Best Christmas Pageant Ever

November 2 – 25

Friday, 7 PM

Saturday & Sunday, 1 & 4 PM

### Elf – The Musical

November 30 – December 23

Friday, 7 PM

Saturday & Sunday, 5 PM



# TICKETS AVAILABLE

A First Point benefit is the opportunity to purchase tickets for shows at CY Stephens, ISU Theatre, ACTORS and Des Moines Community Playhouse. Secure great seats while saving time, processing fees and avoid lines by contacting your Private Banker!

## CY STEPHENS All shows at 7:30 PM

<b>October 17</b>	Celtic Thunder* – \$77	<b>February 14</b>	The King's Singers* – \$45
<b>October 22</b>	The Capitol Steps – \$45	<b>March 28</b>	The Sound of Music* – \$79
<b>October 30</b>	Something Rotten* – \$79	<b>March 29</b>	San Francisco Symphony* – \$100
<b>November 13</b>	Cinderella* – \$79	<b>April 17</b>	Red Green – \$59
<b>November 30</b>	Nöel* – \$60	<b>April 27</b>	Rent* – \$79
<b>January 31</b>	Kinky Boots* – \$79	<b>May 16</b>	Derek Hough: LIVE! – \$85
<b>February 4</b>	Cirque Mechanics – \$45		

\*These shows will have Preshow Dinners, which begin with a social at 5:30 PM, and dinner served at 6 PM. The cost is \$32 per meal, except for The King's Singers at \$40. Let your Private Banker know if you are interested in a Preshow Dinner when you reserve your tickets. Menus are planned with the theme of the performance in mind and include a beverage, meal and dessert.

## ISU THEATRE

Thursday, Friday and Saturday performances are at 7:30 PM, Sunday performances are at 2 PM with the exception of Sunday, April 28, which will be at 1 PM. Single ticket prices are \$18 for adults, \$16 for seniors, and \$11 for students.

<b>November 1 – 4</b>	Orpheus in the Underworld – \$25
<b>November 30 – December 9</b>	It's a Wonderful Life
<b>February 22 – March 3</b>	Sense and Sensibility
<b>April 5 – 14</b>	Godspell – \$25
<b>April 26 – May 5</b>	Iowa Odyssey

## ACTORS (AMES COMMUNITY THEATER)

Thursday – Sunday performances at 7:30 PM, Sunday performances at 2 PM Tickets are \$20 each

<b>November 15 – 25</b>	Clue: The Musical
<b>November 30 – December 1</b>	Almost, Maine
<b>January 31 – February 10</b>	And Then There Were None
<b>April 4 – 14</b>	The 39 Steps

## DES MOINES COMMUNITY PLAYHOUSE

Tickets are \$36 for adults, \$24 for students unless otherwise noted.

Wednesday – Saturday performances at 7:30 PM, Sunday performances at 2 PM unless otherwise noted.

October 5 – 28	Billy Elliot
November 2 – 25	The Best Christmas Pageant Ever (\$18 adults, \$15 students) 7 PM Friday; 1 PM and 4 PM Saturday and Sunday
November 30 – December 23	Elf – The Musical – 7 PM Friday; 1 PM and 5 PM Saturday and Sunday
January 4 – 20	The Miraculous Journey of Edward Tulane – 7 PM Friday; 1 PM and 4 PM Saturday and Sunday (\$18 adults, \$15 students)
January 25 – February 10	Baskerville
February 22 – March 10	Judy Moody & Stink – 7 PM Friday; 1 PM and 5 PM Saturday and Sunday (\$18 adults, \$15 students)
March 22 – April 14	Catch Me If You Can
April 26 – May 12	Ella Enchanted (\$18 adults, \$15 students)

To sign up for social opportunities, financial seminars or to reserve tickets for upcoming theater events, contact your Private Banker today!



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“As my financial needs have grown, First National Bank has been there for every service I have ever needed. First Point has provided me with advice, help and professional long-term planning strategies.”

– **Stewart Burger**