



Ankeny Business After Hours 2021

IN THIS EDITION

Financial Planning • Bank the Knowledge Seminars • Service Highlights • First Point Escapes

YOUR PRIVATE BANKING TEAM



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Financial Planning

Your financial planning needs are unique, and no two plans are alike. We will listen to your needs and customize a plan for you. We make the process simple and use proven strategies to help you identify and work toward your goals. Whether you've never had a financial plan or it's time to dust off and update a 20-year old plan, we are here to help.

What does Financial Planning Mean?

Financial planning is a term that is often used and it means different things to different people. From budgeting, to planning for retirement, to saving for education, to managing your taxes and your investments, "finances" doesn't mean just one thing for all—and "financial planning" means much more than just investing. Bringing all the pieces of your financial life together is a challenging task. At First Point Wealth Management, we take a very comprehensive approach to financial planning, and we believe it is the key to providing a solid financial foundation.

We also realize that financial planning is very personal and unique to each person's situation. We believe developing a comprehensive financial plan that keeps you on the right track to helping you pursue personal economic fulfillment is crucial. Financial planning takes the guesswork out of managing your finances and helps you understand the implications of each financial decision you make. Everyone has different goals, so it's important to have a unique plan that works for you and your financial situation, providing you financial confidence.

In a nutshell, comprehensive financial planning integrates six key steps to assure the best use of your resources in pursuing your goals.

- Set clear goals
- Gather pertinent information related to those goals
- Evaluate your current financial picture
- Develop solutions to help you pursue your goals
- Create an action plan for implementation
- Review and revise the plan as life changes

Why Choose First Point Wealth Management to Help You with Financial Planning?

One of the most important roles our advisors at First Point Wealth Management is that we will help you discern your goals. Once you have identified the goals that are most valuable to you, we recommend solutions to help you most effectively and efficiently pursue those goals. We utilize our entire team of experts to provide the most prudent advice that we can, and with many financial plans, we will team up with your attorney, accountant or other professionals.

Although many professionals may call themselves "financial planners," Our First Point Wealth Management CFP® professionals have completed extensive training and experience requirements and are held to rigorous ethical standards. We understand all the complexities of the changing financial climate and will make recommendations in your best interest. Our ultimate goal is to work with our clients, so they are confident and assured they have all things in place to plan for their financial future.

Securities and advisory services are offered through LPL Financial (LPL), a registered investment advisor and broker-dealer (member FINRA/SIPC). Insurance products are offered through LPL or its licensed affiliates. First National Bank and First Point Wealth Management **are not** registered as a broker-dealer or investment advisor. Registered representatives of LPL offer products and services using First Point Wealth Management, and may also be employees of First National Bank. These products and services are being offered through LPL or its affiliates, which are separate entities from, and not affiliates of, First National Bank or First Point Wealth Management. Securities and insurance offered through LPL or its affiliates are:

Not Insured by FDIC or Any Other Government Agency	Not First National Bank Guaranteed
Not First National Bank Deposits or Obligations	May Lose Value

First Point Private Banking clients have access to completing a complimentary financial plan with a First Point Wealth Management Representative. Contact us today to learn more.

Sydney Pottebaum
Administrative Assistant

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Stephen P. Kester, CFP®
Investment Representative

BANK THE KNOWLEDGE



SEMINAR

Planning for the Future:

A Panel Discussion on Trusts, Taxes and Titling of Assets

Tuesday, August 31 | 11:30 AM to 1 PM

First National Bank | 405 5th St, Ames

RSVP by August 24

Presented by:

Pam Fleener, First National Bank
Rebecca Reisinger, Newbrough Law Firm
Sue Pyle, Pyle & Associates

RSVP by contacting your Private Banker



SEMINAR

Preparing for the Unexpected

Join our presentation to learn more on estate planning, wills, and trusts.

September 8
11:30 AM – 1:00 PM

Please RSVP by September 1

District 36
1375 SW Vintage Pkwy, Ankeny

Presented by:

Elissa Hodges
Hodges Law
Laura Luetje
Lamberti, Gocke & Luetje
Courtney Gibbs
First National Bank

October 12
11:30 AM – 1:00 PM

Please RSVP by October 5

Fire Creek
800 S 50th St, West Des Moines

Presented by:

Louis R. Hockenberg
Sullivan & Ward
Courtney Gibbs
First National Bank

RSVP by contacting your Private Banker

Online Statements:

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Your time is valuable! That's why we are committed to making your banking easier and faster. If you haven't already, sign up for Online Statements to access your statements anytime through Online Banking or through our Mobile App.

Online Statement benefits include:

- **Faster than regular mail.** Receive automatic email notifications when your statements are available. Access and print online statements for your accounts anytime, anywhere.
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- **Easy to save and retrieve.** Three year statement history available on any eligible accounts.
- **Less paper, less stress.** Online Statements are environmentally-friendly and you can easily access up to three years of your documents online without storing files.
- **View check images for all checking accounts.**

It's Easy to Enroll!

1. Go to **www.FNB247.com** and log into Online Banking.
2. Click on "Online Statements".
3. Accept the Online Statement Disclosure form.
4. Open the PDF and confirm that you can view the statement.

Additionally, if you sign up for Online Statements by September 30, 2021, you will be automatically entered into a drawing to win a **FREE iPad**.*

Want to learn more?

Visit **www.FNB247.com** or call us today at **(515) 232-5561**.

*No purchase, payment, donation, account required to win. To register visit First National Bank, 405 5th Street, Ames, IA 50010. Odds of winning will depend on number of entries. Member FDIC.

FIRST POINT ESCAPES



FIRST POINT

TAILGATE

ISU vs. Kansas
SATURDAY, OCTOBER 2

2 Hours Before Kickoff | Tent # TBD

Please join us for a First Point hosted tailgate
to cheer for the ISU football team as they take on Kansas!

Tailgate inspired food and beverages will be served.

RSVP by September 18 by contacting your Private Banker

Center Grove **ORCHARD EVENT**

September 21 | 4 – 7 PM

Center Grove Orchard | 32835 610th Ave, Cambridge

First Point Private Banking invites your family for an evening of fall fun at Center Grove Orchard.

Ride the train while touring the apple orchard,
dine on delicious pulled pork (or hot dog meal for kids)
and homemade applesauce while you enjoy all
the activities that Center Grove has to offer.



RSVP by September 7 by contacting your Private Banker

TICKETS AVAILABLE

A First Point benefit is the opportunity to purchase tickets for shows at these local theatres. Secure great seats while saving time, processing fees and avoid lines by contacting your Private Banker!

CY STEPHENS

1900 Center Drive, Ames

October 21 Ron White, 8 PM – \$74
October 30 Straight No Chaser, 8 PM – \$57.50

*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. 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.

ACTORS (AMES COMMUNITY THEATER)

120 Abraham Drive, Ames

Thursday – Sunday performances 7:30 PM, Sunday performances 2 PM.

July 1 – 11 12 Angry Jurors
September 16 – 26 Nana’s Naughty Knickers
November 11 – 21 Lucky Stiff
January 27 – February 5 Murder on the Orient Express

DES MOINES COMMUNITY PLAYHOUSE

831 42nd Street, Des Moines

Contact your Private Banker for ticket price and availability.

July 9 – August 8	Godspell Thursdays – Sundays 7:30 PM
July 16 – August 1	Plaza Suite Thursdays – Sundays 7:30 PM
July 10 – August 7	Polkadots: The Cool Kids Musical Saturdays 10 AM
July 27	Fae Rides Again 7:30 PM



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**How does First Point
Financial Management
& Trust Services
help you?**

“*The level of professionalism
of their wealth and financial
management team is high;
I have received great value
from their services.*”

– Stewart

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