



First Citizens Wealth[®]

Rebrand & SVB Private Integration

2024 WEALTH ALL HANDS

Allen Taylor & Jen Dowd

February 27, 2024



First Citizens Wealth Brand Refresh

New Logo/Old Logo



Color Imagery



We always find an answer.
WE'RE FIRST CITIZENS WEALTH.
Bring us your questions.

If you don't have questions about your money, you're not thinking enough about it. At First Citizens Wealth, our team can answer any question you have. And ask the questions you need to hear. First Citizens Wealth. Forever First.™

INVESTMENTS • ASSET MANAGEMENT • INSURANCE • RETIREMENT • TRUSTS

FirstCitizensWealth.

FIRSTCITIZENS.COM/WEALTH

Investments, insurance, annuities and trust services are provided by First Citizens Wealth, a member of First Citizens Bank, N.A. They are not a deposit or other obligation of, or guaranteed by any bank, trust company or other financial institution, and are subject to investment risk, including possible loss of principal. Investment products are sold through First Citizens Wealth, a member of First Citizens Bank, N.A. First Citizens Wealth Management is a registered investment advisor. First Citizens Wealth Management is not a broker-dealer. First Citizens Wealth Management is not a fiduciary. First Citizens Wealth Management is not a financial advisor. First Citizens Wealth Management is not a financial planner. First Citizens Wealth Management is not a financial analyst. First Citizens Wealth Management is not a financial consultant. First Citizens Wealth Management is not a financial advisor. First Citizens Wealth Management is not a financial planner. First Citizens Wealth Management is not a financial analyst. First Citizens Wealth Management is not a financial consultant. First Citizens Wealth Management is not a financial advisor. First Citizens Wealth Management is not a financial planner. First Citizens Wealth Management is not a financial analyst. First Citizens Wealth Management is not a financial consultant.



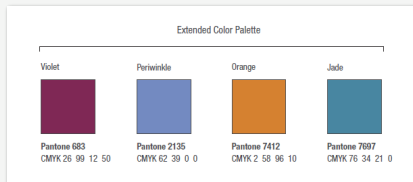
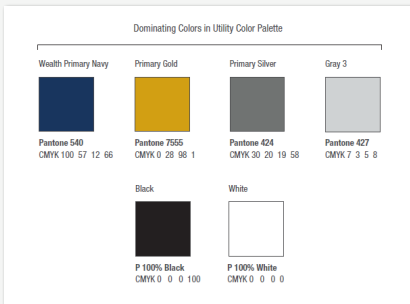
First Citizens Wealth Brand Refresh

Coming Soon

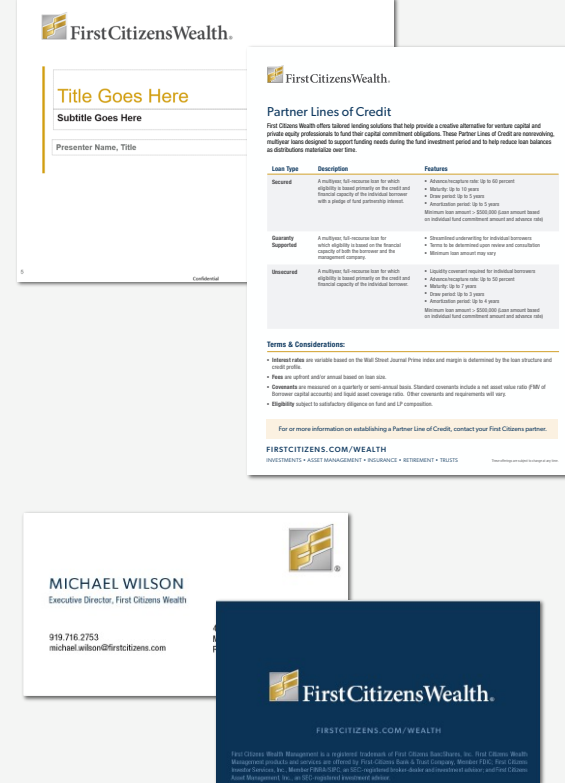
Social Media



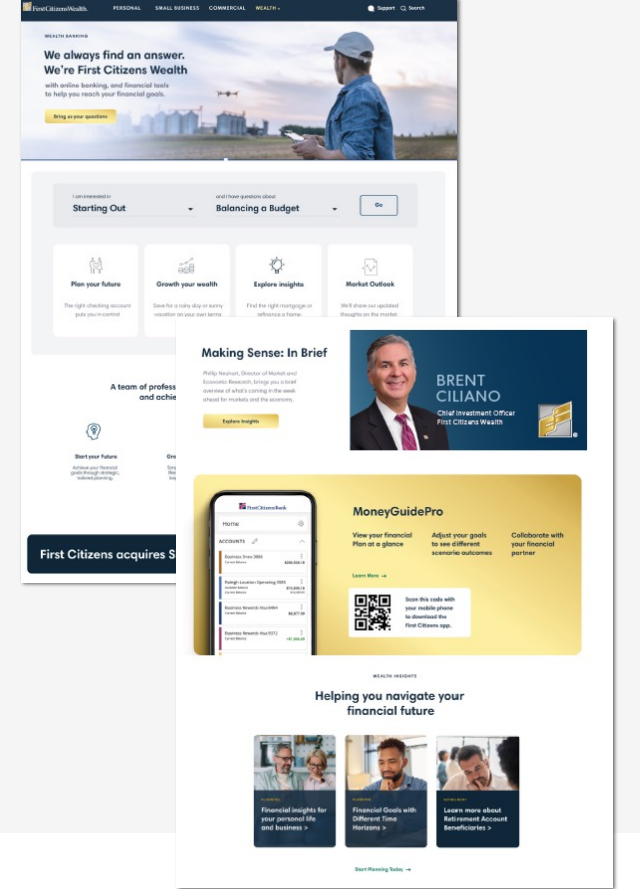
Extended Color Palette



Collateral Templates



Web



SVB Private Integration - Q1

February 2024

Banking, Private Lending and Trust Integration

The collage includes the following screenshots:

- Top Left:** A holistic approach to private banking solutions. A partnership you can count on. Our private banking services are designed to meet your needs and provide personalized solutions.
- Top Middle:** Build a strong foundation for the future. Helping you protect your assets and secure your legacy. Experience-driven solutions.
- Top Right:** Key Benefits of Private Banking. It is possible to find a banker who anticipates your needs, collaborates with your other advisors, offers fully integrated financial services beyond traditional banking and lending—and perhaps even makes the occasional house call!
- Middle Left:** Our private banking services. Deposit Solutions, Private Mortgage Lending, Securities-Backed Lines of Credit, and Customized Lending.
- Middle Right:** Partner with First Citizens Wealth on your next Residential Real Estate Loan. Your help and guidance on this financing option is the concept of relationship banking.
- Bottom:** Personal Digital Banking. Manage your money, anywhere, anytime, and from any web-enabled device with our next digital banking platform.

March 2024

Informing SVB

The graphic includes the following elements:

- Logos:** First Citizens Wealth and Silicon Valley Bank (svb) A Division of First Citizens Bank.
- SALES STUDIO:** A graphic with the text 'SALES STUDIO' and 'svb Silicon Valley Bank'.
- Monday Meeting:** Your Weekly Update. Featuring speakers: Frank Weber, Susan Kurlak, and Christy Knight.

SVB Private Perspectives Newsletter Integrated into Wealth Roundup

The newsletter content includes:

- Header:** First Citizens Wealth. Wealth Monthly Roundup - January 2024.
- Intro:** In this month's roundup, we're welcoming in the new year with some tools and resources to help you grow and protect your wealth.
- Topics:**
 - COMING SOON:** Making Sense – A Market Update. You'll receive the discussion later this month. Submit a market question for the team.
 - ECONOMIC NEWS:** Making Sense – Q&A Series. Watch our latest inflation discussion and learn what might be next for the economy.
- Call to Action:** Ask a Question, Watch Now.
- WEALTH PLANNING:** 2024 Wealth Planning Guide. Get insights into how to plan for new and expiring tax provisions, how to adjust your transfer plan in a high interest rate environment, what to do with leftover 529 funds, and more.
- Get the Guide:** A button to access the guide.
- RECENT IN SIGHT:** Planning for the TCJA Estate & Gift Tax Sunset in 2026. As tax changes loom on the horizon, read our latest update on how you

SVB Private Integration

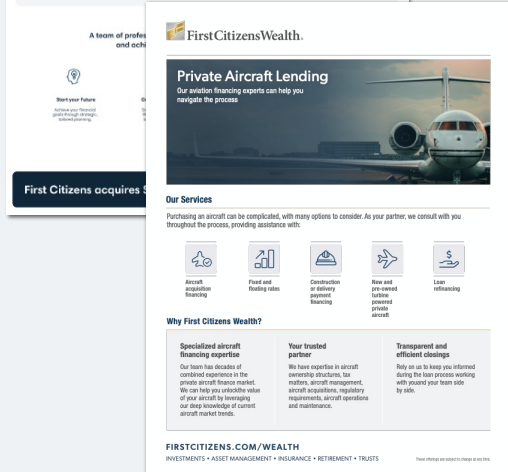
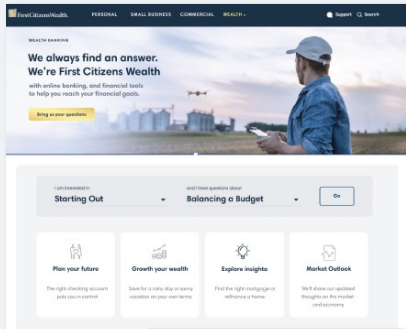
April

May

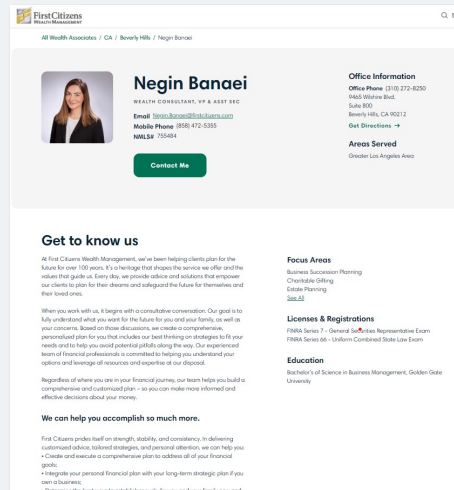
June

July

First Citizens and SVB Private Wealth Collateral Rebranded



SVB Private Bios Move to FCB Wealth



LinkedIn Changes

