Your Money: Banking, Finance, Wealth Management

Busey: Preserving legacies for generations

From preserving and enhancing your assets to ensuring a lasting legacy, Busey Wealth Management provides comprehensive, personalized solutions designed around your financial needs.

For more than 155 years, their dedicated team has been advising individuals, businesses and foundations with a commitment to strengthening legacies. With over 130 professionals, including an experienced investment team and over 50 advisors—virtually all of whom hold advanced designations, including Chartered Financial Analyst® charterholders, Certified Public Accountants, CERTIFIED FINANCIAL PLANNERTM practitioners, Certified Trust and Financial Advisors, and attorneys—they bring clarity to the complex.

"We partner with our clients to take on as much of the complex burden as we can to make their financial life easier," said Executive Vice President and President of Busey Wealth Management Jeff Burgess. "Oftentimes, we find ourselves working as the CFO for our clients, which means that we're at the center of their financial affairs. We can step in and help ease and navigate any complexities."

As a fiduciary, your goals are their goals, and they are committed to acting in your best interest using three core principles. First, their client-focused strategy means they identify prudent financial solutions to meet client-specific needs and objectives—helping clients make better decisions about their wealth. Next, with their unique team-based approach they bring a collaborative team comprised of experienced credentials professionals with broad resources that excel in developing unique solutions. Finally, their comprehensive approach to wealth management brings a fully internalized investment office and an investment philosophy that uses a tailored approach to provide proactive advice—empowering clients to make appropriate financial choices in meeting their goals in every aspect of their financial health.

Offering a broad array of services through seven distinct teams, Busey Wealth Management uses a holistic client-first culture that provides powerful insights and tailored solutions:

- Financial Planning: Retirement, investment and tax planning, as well as life insurance, long-term care and executive stock option strategies.
- Private Client: Concierge banking with one point of contact, along with a complete and simplified coordination of all banking needs.
- Fiduciary Administration: Personal trust services, estate plan reviews and philanthropic advisory services.
- Foundations and Endowments: Specialized strategies and services, as well as in-house investment management.
- Investment Management: Portfolio construction and management, enhanced asset allocation strategies, goal-based asset allocation, tax efficient strategies, distribution planning, open architecture platform and dedicated in-house investment team.
- Corporate Retirement Plans: Retirement plan advisory services and 401(k) management.
- Tax Planning and Preparation: Deduction maximization, capital event planning, tax-advantaged savings and investment strategies, and tax return preparation.

• *Busey Wealth Management has cultivated relationships with their clients that span generations—creating lasting partnerships and a proud heritage. To learn more, visit busey.com/wealth-management.*