As a Johnson Financial Group Private Banking client, you’ll receive customized solutions for all your financial needs, including:

A DISCIPLINED APPROACH
We utilize a disciplined approach built around key elements of Wealth Management that research and experience have shown to be most important to our clients.

PERSONALIZED SERVICE
A team of advisors will help manage, protect and preserve your wealth when and where it is convenient for you.

A COHESIVE PLAN - FROM SIMPLE TO COMPLEX
Work with a team who will collaborate with your attorney, accountant, or tax professional to ensure you have a cohesive wealth management plan.

View the back for special offers designed for Wisconsin Medical Society Members
BANKING

Personalized solutions to help you manage your day-to-day finances.

MANAGING CASH FLOW
• Deposit and cash management services
• Credit services including personal loans, lines of credit and credit cards

CUSTOMIZED LENDING SOLUTIONS
• Debt consolidation

HOME FINANCING
• Exclusive zero down financing for physicians
• Receive one of the fastest application to approval times
• Local servicing for the life of your loan

WEALTH

Build a foundation for achieving your short- and long-term financial goals.

COMPREHENSIVE WEALTH SERVICES
• Portfolio management
• Retirement planning
• ClearWealth® financial plan

Contact a member of our team to learn more:

COURTNEY SEARLES
VP - Private Banking Regional Manager
Certified Wealth Strategist®
NMLS: 1043002
608.250.722

Products and services offered by Johnson Bank, Johnson Wealth Inc and Johnson Insurance Services, Johnson Financial Group companies.

1 Johnson Bank is Member FDIC. All loans are subject to credit and property approval, bank underwriting guidelines, and may not be available in all states. Other loan programs and pricing available. The term of the loan will vary based upon program chosen. Certain conditions, terms, and restrictions may apply based on the loan program selected. Property insurance is required; if the collateral is determined to be in an area having special flood hazards, flood insurance will be required. 2 Investment accounts are: not FDIC insured; not a deposit or other obligation of, or guaranteed by, the bank; and, subject to investment risks, including possible loss of the principal amount invested.

3 Insurance products are offered by Johnson Insurance Services, LLC. Not a deposit; not FDIC insured; not insured by any federal government agency, no bank guarantee; may lose value.