

Bank Perks

Perks offered by one bank to customers who have large amounts deposited at this bank. Assets Under Management (AUM) Some of these services could be free or for a fee. Ask & get them in writing.

- No fees ever for foreign currency exchanges
- No fees ever on all domestic/foreign deposit/wire transfer money
- Provide a Private Banker/Wealth Manager at the time of exchange to initially park the funds in an overnight high yield interest rate account that will yield a minimum of 1% per month.
- No Broker fees ever
- Family Office & Philanthropic Investment Management Services
- Group Health Insurance - to cover signers and families of depositors
- Guarantee 12-15% interest per year on deposits to share in bank profits made from deposits
- Perks can be based on Assets Under Management (AUM) in tier grid
- Discounts on fees depending on AUM and tier grid
- Free Safe Deposit Box, Certified Checks, Notarized, Courier Services & storage for metals (i.e. gold, silver & etc) and waive any storage fees.
- Provide Excess Deposit & Cyber Fraud Insurance (i.e. Lloyds of London)
- Provide Senior Wealth Managers / Investment Bankers for selection
- Tax / Business / Estate Attorney & CPA
- Private transactions representation – assistance in buying a house/car/anything
- Free Due Diligence Services for outside investment opportunities
- 100% funding availability
- Unlimited Platinum or Black Visa Signature Debit & Credit Card with no ATM fees
- Discounted interest rates for all types Loans, Leases & Lines of Credit
- Overseas Bank Trading Platforms by invitation & Repurchase Agreement Sweep Accounts
- Short Term/High Yield Interest Rates
- Provide Multi-Currency Accounts with Debit Card, Offshore Foreign Currency Time Deposits and assist in opening an offshore bank account with affiliate bank for foreign investments
- Access to "invitation only" investment opportunities (domstc. & intn't)
- Pre-IPO deals
- Provide free Executive Privacy Plus subscription with Reputation.com
- Sports tickets in suites and on the floor (Football, Basketball, Baseball, Boxing, Tennis, Golf, NASCAR & etc.) Also, special events like the Super Bowl, NBA Finals, College Bowls, NCAA Final Four, World Series & the Olympics. Based on AUM in a tier grid
- Entertainment & Concert tickets in suites and on the floor (Music Concerts, Entertainment Awards Shows, Premier Movie Screenings, TV Show tickets & etc.) Based on AUM in a tier grid
- Limousine & VIP transportation based on AUM in a tier grid
- Private Jet Travel (5-25 flight hrs. per mo.) based on AUM in a tier grid on flight hours per month
- First Class seats/commercial airlines based on AUM in a tier grid
- Private Yacht access/usage (40 hrs. annually) based on AUM in a tier grid on access/usage hours per year
- Donations to our favorite charities (Banks matching a certain %)
- Prime seats at charity events
- Suites at Luxury Hotels & VIP Dinners at Restaurants based on AUM
- Membership fee & Annual fees to Inspirato Core resorts & residences
- Membership fee & Annual fees to Exclusive Resorts & Residences for 60 days with Priority Holiday Access annually
- ClubCorp Private Membership based on AUM
- Spa & Massage Club Membership based on AUM in a tier grid
- Concierge Services 24/7 based on AUM
- Provide a free Google Pixel C 10.2 Tablet 64 with keyboard & Solarin Fire Black Carbon DLC cell phone & concierge subscription service for members with \$1 million and over AUM
- Free Family Financial Education provided for group family members