Your Experienced Professional Fiduciary

Berkshire Bank Profile

Founded in 1846, Berkshire Bank is one of Massachusetts' oldest and largest independent banks with assets of over $13 Billion. Now headquartered in Boston, Berkshire provides business and consumer banking, mortgage, wealth management, investment and, insurance services through 132 branch offices in New York, Connecticut, Vermont, New Jersey, Pennsylvania, Rhode Island and Massachusetts, including Commerce Bank, a division of Berkshire Bank. Berkshire Bank is committed to operate as an independent bank delivering exceptional customer service and a broad array of competitively priced business and consumer banking products and services. Through its subsidiaries, Berkshire Bank also offers a full range of asset management/trust, insurance and investment products. Berkshire Bank is recognized for its entrepreneurial approach, relationship customer experience, and distinctive culture embracing and celebrating the diversity of all customers, employees and, suppliers - as its commitment to diversity continues to grow.

Berkshire Hills Bancorp, Inc., publicly traded on the NYSE Exchange, under symbol BHLB, is the holding company for Berkshire Bank.

Berkshire Bank Wealth Management – Your Trustee

Your policy benefits are paid into your Trust administered by the professionals in the Wealth Management Group of Berkshire Bank. As your corporate fiduciary the staff brings over 175 years of experience in managing these funds with a focus on your specific situation and objectives. Prudent investment guidelines address variables of proper asset allocation, asset quality, diversification and an appropriate level of risk. Your corporate trustee provides financial protection, dependability and personal service.

Trustee Overview:

- Certified Financial Planners (CFP®); Certified Trust and Financial Advisor (CTFA®) and Chartered Financial Analysts (CFA®)
- Attorneys on Staff
- 175 years of combined experience
- Over $1 Billion in assets under management
- Independent investment manager and trustee

Investment Options

Trust and investment officers are assigned to your relationship and remain available to monitor your trust. Objective, experienced bankers coordinate the plan. Integrity of the funds is important. A corporate trustee provides a safe environment with regulatory, audit and compliance safeguards.

Upon funding of the trust, Berkshire Bank will help you structure an investment program to suit your long-term goals by utilizing a broad selection of equity or fixed income funds.

For more information, contact the Wealth Management Group toll free 855-843-4716

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