



# PEAPACK-GLADSTONE BANK

*Private Banking since 1921*

## Institutional Private Banking

In addition to working with individual clients and families to help them define and achieve their goals and objectives, Peapack-Gladstone Bank also provides institutional advice and service to Endowments, Foundations, Colleges, Prep-Schools, Universities, Pension Plan Sponsors, Labor Unions, Churches, Synagogues, Hospitals, Cemeteries and other Not-For-Profit and Eleemosynary organizations.

Our value-add in this middle market is working with plan committees by defining goals, crafting Investment Policy Statements, offering advice on asset allocation, reviewing benchmarks and rebalancing accounts.

Within our institutional division, we focus on organizations that are largely underserved by the larger banks and asset managers – those entities with assets ranging between \$1 Million to \$50 Million. PGB services these organizations by providing:

- Asset Management with Traditional Stock and Bond Portfolios
- Short Term Money Management Accounts
- FDIC Insured Deposit Services up to \$50 million\*
- Custodial and Safekeeping Services

Our proprietary, solution-based asset management advice offers core equity management with a value tilt along with quality government and corporate fixed income investments with intermediate maturities. These portfolios are customized in separate accounts for clients.

We provide open architecture investment solutions to our institutional clients and are able to provide additional diversification and mitigate risk in client portfolios through our access to comprehensive research, analytical tools and databases that help us construct investment solutions using best in class, third-party investment managers across the full spectrum of traditional and alternative asset classes.

**To find out more about our full suite of offerings and capabilities, please contact:**

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Nondeposit investment products are not insured by the FDIC; are not deposits or other obligations of, or guaranteed by, Peapack-Gladstone Bank; and are subject to investment risks, including possible loss of the principal amount invested. \*Funds participating in the PGB Insured Liquidity Sweep Account are deposited into deposit accounts at participating banks, which are insured by the Federal Deposit Insurance Corporation (FDIC) for up to \$250,000 for each category of legal ownership, including any other balances you may hold directly or through other intermediaries, including broker-dealers. The total amount of FDIC insurance for your account depends on the number of banks in the program. If the balance in your account is greater than the FDIC insurance coverage in the program, any excess funds will not be insured. Please read the Program Terms and Conditions carefully before depositing money into the program and for other important customer disclosures of information. To assure your FDIC coverage, please regularly review banks in which your funds have been deposited, and notify your bank immediately if you do not want to allocate funds to a particular bank or banks.





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## Client Testimonials

### The Seeing Eye

“Over the past two years, we have been investing with Peapack-Gladstone Bank for our short-term liquidity needs. PGB offered us the insured liquidity sweep solution to earn a competitive market rate of interest as well as the safety of extra FDIC Insurance. Each member of the Bank’s team has consistently delivered a high-level client experience. We look forward to continuing our relationship with Peapack-Gladstone Bank as a partner, and anticipate that when additional banking needs arise, we will not hesitate to contact them.”

– Bob Pudlak, CFO and Director of Administration and Finance, The Seeing Eye

### Somerset County YMCA

“As a charitable organization, the Y’s cause is to strengthen the community through youth development, healthy living and social responsibility. At the Y, we are committed to nurturing the potential of kids, improving health and well-being, and fostering a sense of social responsibility throughout Somerset County. Lasting personal and social change can only come about when we all work together to invest in our kids, our health, and our neighbors. Peapack Gladstone Bank has helped us to be excellent stewards of the funds entrusted to us that help advance our mission, transform lives, and propel our community forward.”

– David M. Carcieri, President and CEO, Somerset County YMCA

### Matheny

“Our partnership with Peapack-Gladstone Bank began many years ago with a fiscal relationship and a community affiliation, as the Bank has been a long supporter of our annual Miles for Matheny event. The PGB team always works to ensure we have the right financial solutions in place so we can handle the day-to-day delicate needs of our students and patients efficiently and effectively. We love how involved the Bank and its employees are in the community and our facility—volunteering at the hospital at various times throughout the year, and as the cycling sponsor for Miles for Matheny, providing rest stops to hundreds of participants. PGB really makes us feel like a priority.”

– Kathleen F. Powers, CPA, CGMA, Vice President of Finance, Matheny