



wealth management  
built around *you*

**mb** wealth  
management

MB Wealth Management is a brand name used by MB Financial Bank, N.A. and its subsidiaries.

Whether you are a business owner,  
family and/or an organization, our team  
of experts are dedicated to helping  
*protect and manage your assets.*









**W**e work seamlessly across service lines and specialties to deliver holistic, integrated and custom wealth management and investment advisory solutions that are as unique and diversified as the needs and situation of each client we serve.

By understanding your personal and professional goals and working *with* you—not just for you—we are skilled in simplifying what can be a complex planning process.

— WHY CHOOSE MB —

<b>A local team who understands you personally</b>	<b>Specialized expertise aligned to your life &amp; business stages</b>	<b>Access to sophisticated tools, resources &amp; strategies</b>
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— OUR COMPREHENSIVE SET OF SERVICES INCLUDE —

 <b>Private Banking</b> <a href="#">Learn More</a>	 <b>Private Client Services</b> <a href="#">Learn More</a>	 <b>Personal Trust &amp; Estate Settlement Services</b> <a href="#">Learn More</a>
 <b>Investment Management</b> <a href="#">Learn More</a>	 <b>Guardianship &amp; Special Needs Trust Services</b> <a href="#">Learn More</a>	 <b>Institutional Trust &amp; Retirement Plan Services</b> <a href="#">Learn More</a>

Learn more about our wealth management solutions.

[mbfinancial.com/wealth](https://mbfinancial.com/wealth)

Wealth management services are offered by MB Financial Bank, N.A. and its wholly-owned subsidiary MSA Holdings, LLC ("MSA") through MSA's subsidiaries MainStreet Investment Advisors, LLC ("MainStreet") and Cedar Hill Associates, LLC ("Cedar Hill"), collectively "MB Financial." MainStreet and Cedar Hill are Registered Investment Advisors with the Securities Exchange Commission.

# *Private Banking*

**P**rivate banking with MB Financial is a relationship-driven experience. By getting to know you and your family, we are optimally positioned to handle your borrowing and deposit needs.

Our expertise in reviewing complicated cash flow situations helps us to advise our clients through the borrowing process to make the experience as efficient as possible. For our deposit customers, having a dedicated private banking team to call for servicing requests makes handling your day-to-day banking needs easier, while still having access to MB's branch network and online banking.

*Our low advisor-to-client  
ratio provides you with  
personal access.*



Learn more about our [private banking services and credit/deposit products](#).

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# Private Client Services

**O**ur experienced private client team works with high net worth individuals and families throughout the entire financial life cycle.

Serving as your personal “wealth concierge,” we bring together the specialized expertise, resources and tools to meet both immediate and long-term financial goals.

Working in close collaboration with credentialed experts across our banking, investment, financial, tax and estate planning and personal trust teams, we are able to provide unique holistic services and solutions that are custom tailored to your specific situation.

*We are designed to be a single-source solution for your financial needs.*

## — ADDITIONAL SERVICES INCLUDE —

### Private Banking

[Learn More](#)

### Investment Management

[Learn More](#)

### Personal Trust Administration

[Learn More](#)



Learn more about our full array of [private client services](#).

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*Experience matters.*

Our team of credentialed specialists average  
more than 20 years of experience.



# Investment Management

**O**ur investment management team works closely with you and your family to deliver customized investment solutions based on in-depth research and analysis. We provide a balanced risk-and-return approach based on your unique situation and needs.

As a trusted partner, our focus is on helping you build customized portfolios based on your specific situation as well as aspiration, leveraging a wide spectrum of asset classes to preserve and grow your investments. Our strategies are broad-based and include active and passive, socially responsible, and alternative investments.

Our investment management approach is a dynamic, holistic, consultative, ongoing exchange with our clients and their advisors.

*MB has more than \$7 billion in assets under management and supervision.*



Learn more about how our [investment advisors](#) will help you work toward your financial goals.

See what is included in our [investment platform](#), which is designed to serve the diverse and evolving investment goals of individuals and families.

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# Personal Trust & Estate Settlement Services

**D**isclosing your personal financial matters to a financial institution requires trust, especially when defining, creating and maintaining your family's legacy. As you navigate the sensitive relational and financial issues that are unique to you and your family, choosing the right institution to guide you will result in the development of solutions that meet your family's unique short-term and long-term planning goals.

*Communication with the beneficiaries and other parties to an estate throughout the settlement process is key to providing the needed support to your family.*

We have an array of planning options available to develop the customized, comprehensive solutions to help form your family's legacy as you envision it. As a corporate trustee, executor or agent, we also have the expertise to deploy personal trust and estate services on your family's behalf.

## ESTATE SETTLEMENT SERVICES

The administration of your estate following your death is a complex process that impacts your family and others deeply during a season of loss. This is why we work so closely with your family—and all related parties—as executor, trustee or agent, to administer your estate effectively and according to your wishes.



Learn more about our [personal trust administration solutions](#) and [estate settlement solutions](#).

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# *Guardianship & Special Needs Trust Services*

**A**s a corporate guardian of an estate or corporate trustee of a special needs trust, we understand the issues associated with these estates and trusts benefiting minors or disabled adults. The family issues associated with administering these trusts and estates emerge from the goal that your loved one receives the best possible care from all available resources. This goal may require careful coordination in order to maintain access to available governmental benefits.

We have many years of experience in serving as the court-appointed guardian of estates, as well as the corporate trustee of special needs trusts, which are often supervised by a court.

*We are one of the  
largest providers of  
guardianship services  
in Chicagoland.*



Learn more about our [guardianship and special needs trust services](#)  
and [customized administration solutions](#).

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# *Institutional Trust & Retirement Plan Services*

*We deliver institutional investment management capabilities to sponsors of retirement plans beginning at \$2 million in assets.*

**F**or more than 100 years we have been providing fiduciary and investment services to Chicagoland employers, nonprofit organizations and public funds. As a result, we understand two of the most important aspects of how to successfully, and consistently, offer such services: Every institution and organization is unique, and each requires a strong foundation.

This is why our team of dedicated relationship managers and investment professionals is specifically versed in identifying, integrating and implementing the necessary components of a sound investment strategy. We also provide the necessary administrative services and support required to meet the financial objectives of each organization's specific needs.

Further, our comprehensive, transparent, unbiased and fee-only approach means that our clients are able to have a full understanding of the costs associated with our services. Our retirement plans and services are based on a consultative approach tailored specifically to participants' goals—and feature open architecture, administrative efficiency, full-fee disclosure and more.

We invite you to learn more about our institutional trust and retirement plan services which include employer-sponsored retirement plans, institutional investment management, foundations and endowments, police and fire pension funds, and more.



Learn more about [institutional trust](#) and our [retirement plan services](#).

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We are a dedicated Chicagoland-based  
wealth management team  
*committed to serving your needs.*





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