

# History and Community Connection Make This Investment Firm Stand Out

*Wealth Management Group Located at American National Bank of Texas*



## Recognized as One of the Best in the Business

As one of the oldest privately owned banks in Texas, ANBTX has been a strong partner in the lives of its customers in North Texas since

1875. Long-term relationships have been a part of that history since the beginning and are still at the heart of the bank's mission today: to build loyal, mutually profitable relationships by excelling at understanding the needs and aspirations of customers.

Named among the top 25 largest wealth management companies in North Texas five years in a row, Wealth Management Group located at ANBTX is widely recognized for excellence in the region, with a leadership team that together has more than 75 years of experience in the industry and oversees \$1.5 billion in assets (including \$200 million in brokerage assets and \$100 million in advisory assets).

Professionals in the group have an average tenure of 17 years of experience and, more importantly, are active participants

in the communities where they work, says Cheryl Sutter, senior vice president and director of investment services.

"Community service is a big part of this organization," she says, noting that ANBTX has been honored by the *Dallas Morning News* as one of the top 100 places to work in the Dallas/Fort Worth area for five consecutive years. "Because of our history, we have deep core values that align with the communities we serve. For our employees, this isn't just a job. It's a lifestyle."



ANBTX Wealth Management Team from left: Cheryl Sutter, Senior Vice President; Kathy Howe, Executive Vice President; Lou Johnson, Senior Vice President

From traditional banking to investment strategies to trust services and administration, ANBTX and its Wealth Management Group can address their clients' needs from the big picture to the smallest details at every turn of their lives.

When it comes to wealth management, understanding the big picture is every bit as critical as attending to the small details.

Clients of the Wealth Management Group (WMG), located at American National Bank of Texas (ANBTX), can expect a breadth of services that will address all their needs and goals for each phase of their lives, including individual investing, corporate or individual retirement planning, and trust services and administration.

Kathy Howe, executive vice president and director of wealth management, says WMG is able to offer a greater scope of services than many other wealth management businesses because of the strength of the bank and its ability to attract and retain experienced industry leaders.

"We provide customized strategies using a team approach," she says. "Clients can get help for their financial needs from youth to retirement and estate administration. You don't easily find that level of service in one place."



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