YOU’VE ARRIVED AT BROADWAY BANK

As you consider what you’ve already achieved, you’re also likely thinking about what’s next. Building wealth over your lifetime brings with it a unique set of complexities and considerations that elevate your financial situation to a level that demands expertise.

While your success has been all your own, you can now take comfort in the fact that you don’t need to manage it alone. You’ve been looking for a financial partner, and you’ve arrived at Broadway Bank Wealth Management.
INTRODUCING OUR NEW WEALTH MANAGEMENT PLATFORM: INSIGHT

At Broadway Bank, we offer three unique solutions to grow and protect what you’ve worked so hard to build.

**INSIGHT DIGITAL**
Designed for the tech-savvy investor, this solution captures the best thinking of our in-house investment management team while providing clarity of goals and how to increase your likelihood of achieving them.

**INSIGHT ADVISOR**
For those that want the guidance of an experienced, dedicated Financial Advisor, this solution is designed for in-depth goals based conversations that are intended to create clarity, while leveraging our investment perspective.

**INSIGHT PARTNERS**
Sometimes the clearest vantage point comes from having a team of professionals to guide you. This completely customized, exclusive offering gives you access to dedicated partners which may include: Wealth Advisor, Financial Advisor, Wealth Associate, Portfolio Manager, Oil & Gas Manager, Real Estate Manager and Estate Settlement Specialist.

NOT FDIC INSURED • NOT A DEPOSIT
NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY
NOT BANK GUARANTEED • MAY LOSE VALUE

Offered through Broadway Wealth Solutions, Inc., a Registered Investment Advisor wholly owned but separate from Broadway National Bank. For further information, please contact us for a copy of our disclosure documents, including Form ADV Part 2A and supplemental materials.
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INSIGHT STARTS WITH A CUSTOM BUILT FINANCIAL PLAN, DESIGNED FOR CLARITY AND PERSPECTIVE

Financial Advisors from Broadway Bank, many of whom are also Certified Financial Planners™, can take the guesswork out of managing your finances and help you understand the implications of each financial decision you make. From budgeting, to planning for retirement, to saving for education, to managing your taxes and your insurance coverage, “finances” doesn’t mean just one thing—and “financial planning” means much more than just investing.

At Broadway Bank, you can rest assured that our Advisors will put you and your needs at the center of every financial planning engagement.

- Investment management
- Tax considerations
- Retirement
- Estate
- Insurance

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Goals require **STRATEGY** and our **INSIGHT** platform is designed to get you there

CONTACT US to learn more about how we might help you achieve the financial future you envision.
ABOUT BROADWAY BANK

Headquartered in San Antonio, Broadway Bank was founded in 1941. It has evolved from a small neighborhood bank into one of the largest independently owned banks in Texas. Today, Broadway Bank continues to function as a family-owned and operated financial institution. Broadway Bank offers a full-range of sophisticated financial services, including personal banking, private banking, military banking, business banking and wealth management. In excess of $3.5 billion in assets, the highly rated Bank operates more than 35 financial centers in the San Antonio and Austin regions. Visit www.broadway.bank for more information.