

# Bank Perks

1. No fees ever for foreign currency exchanges
2. Provide a Private Banker/Wealth Manager at the time of exchange to initially park the funds in an overnight high yield interest rate account that will yield a minimum of 1% per month.
3. Family Office Services
4. Perks can be based on AUM (Assets Under Management) in a tier grid
5. Discounts on AUM fees
6. No fees ever - no fee to deposit/wire transfer money
7. No Broker fees ever
8. No ATM fees ever for “in network” or “out of network”
9. Free Safe Deposit Box, Certified Checks, Notarized, Courier Services
10. Provide Excess Deposit Insurance (i.e. Lloyds of London and/or Travelers)
11. Provide Senior Wealth Managers/Investment Bankers for selection
12. Tax/Business/Estate Attorney & CPA
13. Private transactions representation –assistance in buying a house/car/anything
14. Free Due Diligence Services provided for outside investment opportunities
15. 100% funding availability
16. Unlimited Platinum or Black Visa Signature Debit & Credit Card with **no** ATM fees
17. Provide all types of Loans, Leases & Line of credit with no application fees.
18. Line of Credit available
19. Group Health Insurance - to cover the signers and families of depositors
20. Provide Private Placement Annuities & Private Placement Life Insurance for each group member
21. Guarantee 12-15% interest per year on deposits
22. Bank Trading Platforms & Repurchase Agreement Sweep Accounts
23. Short Term/High Yield Interest Rates
24. Assist in opening an offshore bank account with affiliate bank for foreign investments

25. Access to information on great investment opportunities
26. Pre-IPO deals
27. Provide **free** Executive Privacy Plus subscription with [Reputation.com](https://www.Reputation.com)
28. Sports tickets in suites and on the floor (Football, Basketball, Baseball, Boxing, Tennis, Golf, NASCAR & etc.) Also, special events like the Super Bowl, NBA Finals, College Bowls, NCAA Final Four, World Series & the Olympics. Based on AUM in a tier grid
29. Entertainment & Concert tickets in suites and on the floor (Music Concerts, Entertainment Awards Shows, Premier Movie Screenings, TV Show tickets & etc.)  
Based on AUM in a tier grid
30. Limousine & VIP transportation based on AUM in a tier grid
31. Private Jet Travel (5-25 flight hrs. per mo.) based on AUM in a tier grid on flight hours per month
32. First Class seats/commercial airlines based on AUM in a tier grid
33. Private Yacht access/usage (40 hrs. annually) based on AUM in a tier grid on access/usage hours per year
34. Donations to our favorite charities (Banks matching a certain percentage)
35. Prime seats at charity events
36. Suites at Luxury Hotels & VIP Dinners at Restaurants based on AUM
37. Membership fee & Annual fees to Inspirato Core resorts & residences
38. Membership fee & Annual fees to Exclusive Resorts & Residences for 60 days with Priority Holiday Access annually
39. ClubCorp Private Membership based on AUM
40. Spa & Massage Club Membership based on AUM in a tier grid
41. Concierge Services 24/7 based on AUM
42. Provide a **free** 10" Tablet or 13" Notebook based on AUM
43. Provide a **free** Vertu Ti cell phone & concierge subscription service for members with \$1 million and over AUM

44. Free Family Financial Education provided for group family members

45. Provide any and all other perks that was not mentioned

AUM - Assets Under Management  
Global Leader Risk Mitigation & Response

[www.Kroll.com](http://www.Kroll.com)

Luxury Destination Clubs

[www.Inspirato.com](http://www.Inspirato.com)

[www.ExclusiveResorts.com](http://www.ExclusiveResorts.com)

Private Business Club

[www.ClubCorp.com](http://www.ClubCorp.com)