

Wealth Management

We Treat Every Client as an Individual

[Have a Question?](#) 

invest & manage

Navigating your financial path is easier with the right guide

At Rollstone Bank & Trust, our wealth management professionals are here to help you prepare for tomorrow – today. We do not take the “one size fits all” approach. Rather, we treat every client as an individual with a unique and deeply personal set of circumstances. Private ownership allows us the freedom and independence to make decisions based upon each client’s best interests instead of those of shareholders or corporate interests, and we are the only locally-based Trust Department in North Central Massachusetts.

RBT’s Wealth Management team will help you maximize your wealth by integrating tax, investment, and insurance strategies into one individualized plan to help you achieve financial success. We will be with you at every stage of your life – whether you are just graduating from college, expanding your family, getting ready to retire, or planning your legacy. RBT’s Wealth Management solutions include a wide variety of investment services, [trust services and estate planning](#) to complement and complete your financial plan.

Not FDIC Insured	No Bank Guarantee	May Lose Value
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Not a Deposit	Not Insured by any Federal Government Agency
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Trust Services & Estate Planning

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You can feel safe knowing our Wealth Management team of trust administrators and portfolio managers are caring for your assets according to your instructions. We will fully explain all options available to you and how they fit into your overall financial plan. [Learn more about our Trust Services & Estate Planning.](#)

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