Wealth Management

In 1846 we were a pioneer community bank. Today, we are still pioneering with new banking ideas and good old-fashioned personal service. Our dedication to providing customers with superior financial products and the support they need to prosper at work and at home has enabled us to build on of the most trusted banks in the region.

At Rollstone Bank & Trust 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.

We are able to take a long-term view that is not clouded by quarterly earnings or market fluctuations.

By recognizing your unique financial circumstances, Rollstone applies tailored solutions that meet your specific needs. Our innovative approach goes well beyond the offerings of a traditional private bank, and considers not only the financial, but also the life events of high net worth individuals and families.

RBT WealthManagement

When you choose Rollstone Wealth Management for your financial planning partner, you get:

- A team of experienced relationship managers, with a single point of contact.
- Internal specialists and business partners with a proven track record of success in the core disciplines of high net worth and family wealth management.
- A plan that provides clear direction, but remains flexible enough to respond to changes in the market and your personal circumstances.
- Objectivity & transparency from an independent partner focused on your financial well-being.

We understand the difference between having a good quarter, and having a good life.

rollstonebank.com ▪ 800.640.1166

Wealth Management

Instead of worrying about short-term issues such as quarterly earnings, we focus on the financial well-being of our clients.

As a fiduciary, we treat our clients with the highest level of care and always put their needs first. In an era of extreme market volatility, concerns over privacy, and dramatically changing demographics and life events, our ability to act as a multi-generational wealth manager occupies a unique position in the financial services landscape.

Our fees are based solely on the assets under management and cover the following services:

INVESTMENT MANAGEMENT

- Asset Allocation Strategies
- Alternative Investments
- Customized Portfolio Reporting
- Diversification Strategies

WEALTH PLANNING

- Trust and Estate Planning
- Insurance Assessment
- Tax Planning Recommendations
- Corporate Trustee Services
- Charitable Giving Strategies

Contact Rollstone Wealth Management today at 800.640.1166 for a free review of your financial plan.

We believe that objectivity & transparency are essential to a successful relationship with you.

Full-Service Branches

486 John Fitch Highway, Fitchburg
529 Electric Avenue, Fitchburg
24 Monument Square, Leominster
721 Central Street, Leominster
283 Ayer Road, Harvard
225 Main Street, Townsend
788 Boston Road, Groton

Additional Locations

Administrative Offices
780 Main Street, Fitchburg

Mortgage & Loan Center
4 Central Street, Leominster

Loan & Wealth Management Center
25 Harvard Street, Worcester

RBT WealthManagement

Rev 2.24