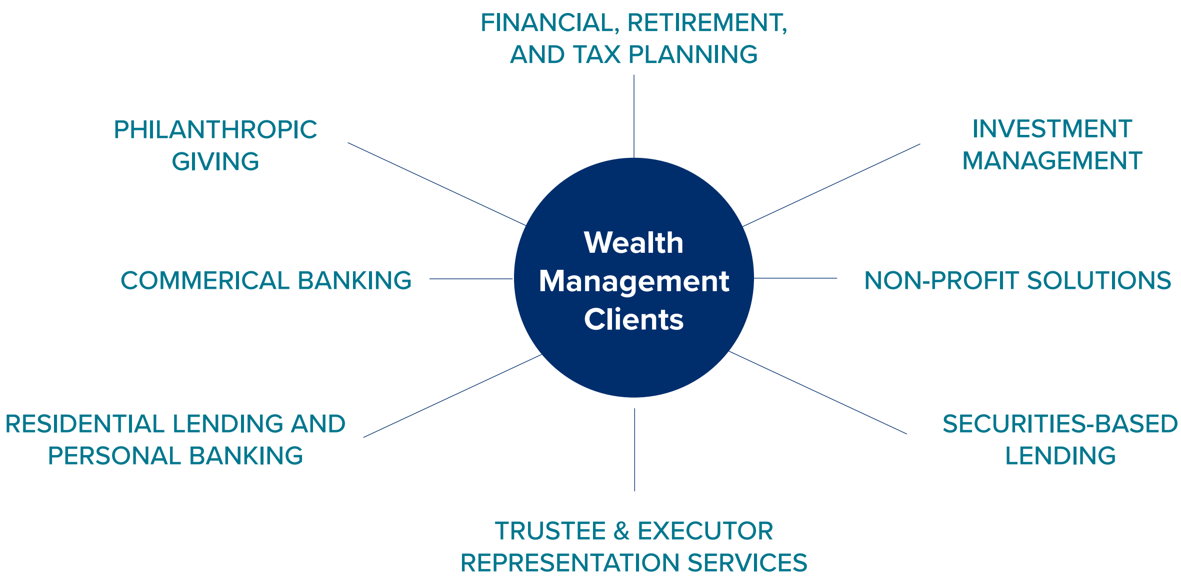
WASHINGTON TRUST
Wealth Management®

About Us

Washington Trust Wealth Management has been providing client-focused financial solutions to individuals, families, foundations, endowments, municipalities, and businesses for more than a century. Backed by the strength and stability of a 220+ year-old financial institution, today our group manages **$6.7 billion***.

Our Focus

Washington Trust Wealth Management takes a holistic view of your financial needs to help you reach your financial goals. As an essential part of our planning, we include sophisticated advice spanning financial planning, investment management, trusts, lending and banking, to help you write your complete wealth story.



The Washington Trust Difference

Washington Trust Wealth Management is a preeminent regional wealth advisory group in the northeastern United States.

A RICH HISTORY
Division of The Washington Trust Company, one of the Northeast's premier financial services companies, the largest Rhode Island-chartered bank, and the oldest community bank in the nation

INDUSTRY LEADER
Through both organic growth and strategic acquisition, we have built one of New England's premier boutique advisory groups, with offices in Rhode Island, Massachusetts, and Connecticut

CLIENT FOCUS
We offer customized solutions that meet our clients' changing needs over time, with a holistic approach and sophisticated strategies

TRUSTED ADVICE
Our group consists of more than 100 highly credentialed professionals holding one or more of the following designations: JD, CPA, CFA®, CFP®, MST, MSFP, MSPFP, CLU®, and MBA

See reverse for Important Full Disclosures

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*As of 06/30/22.

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The Washington Trust Company, Member FDIC, NMLS #414716, Equal Housing Lender; A Securities-Based Line of Credit will have a minimum loan amount of $250,000; a minimum $250 documentation fee; and a $50 annual fee. Under the line of credit, the lendable value of each asset class is up to 90% for treasuries, 80% for qualified bonds, 70% for qualified stocks, and 50% for qualified mutual funds.

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