



Commercial & Private Banking Wealth Management Advisory Services

We are here to help you succeed.

We provide financial services as they should be – with customized solutions and personalized service to make your financial picture less complicated. Whether you are looking for commercial or private banking, wealth management or advisory services, we work to understand your full financial picture and help you reach your goals.

HOW OUR CORE VALUES ENHANCE YOUR EXPERIENCE

Golden Rule

We always put your best interest first.

Character

We conduct ourselves with the highest level of honesty and integrity.

Innovative & Creative Spirit

We never stop pursuing strategies to create value.

Professionalism

We attract and retain the brightest and most motivated talent to better serve you.

Work Ethic

We bring a goal-oriented and hardworking spirit to achieve your objectives, every day.

WHO WE SERVE

Closely held businesses and professional practices

Professionals and business owners

Individuals and families building generational wealth

The Oakworth Experience



At the center of our approach, you.

We always put your best interest first. The next ring represents your primary advisor. Regardless of the diversity of your needs, you will always have one central point of contact who organizes your Oakworth team to give you unique guidance within each of our core disciplines, represented in the outer ring.

Transitioning to Oakworth: Our 4-Step Process

As life changes, your team will adjust this journey to track with your goals.

1

Understanding Your Full Picture

We meet with you to gather information about your current financial situation and understand your goals and priorities.

2

Customizing Solutions

Oakworth associates—whose expertise suits your individual needs—collaborate and propose customized financial solutions and develop your transition plan.

3

Establishing Relationships

We establish, coordinate and structure your accounts while facilitating a seamless transition from any previous financial institutions.

4

Helping You Succeed

Your Oakworth team will ensure a high level of service, communicating regularly and adjusting solutions as needs and priorities change.

What Makes Us Different:



People

The quality of our professionals is unmatched – something our clients say sets us apart. We are experts in our disciplines, we work hard and we help you succeed.



Service

You'll build a relationship with one primary advisor, backed by a team of financial professionals. This allows us to prioritize a personal connection, gain a deeper understanding of your goals and deliver the best experience possible.



Easy

You'll discover how easy it is to do business with Oakworth. That starts with fully understanding your financial picture. Our professionals then walk alongside you and provide expert guidance so you can focus on other important areas of life.

WHAT OUR CLIENTS SAY

“Smart people. Smart technology. Smarter banking. Oakworth knows what it's like to juggle everything you have to juggle, and they know what it's like to have to manage all the different aspects of a business. They just think about service differently.”

Bew White

Owner | Summer Classics

94

NET
PROMOTER
SCORE*

#1

“BEST BANK
TO WORK FOR”
6 OF THE LAST
7 YEARS

95%

CLIENT
RETENTION
RATE*

*Fiscal Year 2024

