

Marketing Toolkit for Advisors

Collateral Support for Advisors and Associates

Telling the Oakworth Story
(Prospect Meeting)

Winning Relationship
(Presenting Solutions)

Becoming the
Trusted Advisor
(Updating Relationships)

Banking

OCB [Company Story](#) *
OCB Company Story [Script and PPT](#)
Waterfall Piece *

Banking Specific:

None available

Financials:

[Safety & Soundness](#)

Pandadoc Proposals *-

Treasury: Deposit Mgmt, Corp Liquidity
Treasury: Fraud Deck
Treasury: Services
Commercial / Private Banking: Services

Treasury:

[Treasury Products & Services](#)
[Treasury Management Infographic](#)
[Deposit Management & Corporate Liquidity](#)
[Corporate Fee Sheet *](#)
[Commercial Fee Sheet](#)
[ICS \(IntraFi\) *](#)
[Positive Pay Sheet](#) | [Positive Pay Demo Video](#)

Oakworth.com [Useful links](#)
[Online Banking Enrollment](#)
[Business Online Banking Enrollment](#)
[Corporate Fraud Content Series-](#)

[Transition to Private Banking Guide](#)
[Transition to Commercial Banking Guide](#)

Wealth

OCB [Company Story](#) *
OCB Company Story [Script and PPT](#)
Waterfall Piece *

[Wealth Portal Online Instructions](#)

Wealth Pitch Book **

[Corporate Trustee One Pager](#)

Financials:

[Safety & Soundness](#)

Pandadoc Proposals *-

Intro to Wealth Management
Investment Strategy
6 Investment Policy Statements Strategies
Services Proposal
Fee Schedule
[Thought Leadership *](#)

[Investment Committee Bio Sheet *](#)

Wealth Teams by market *

[Estate Tax Content Series](#)

[Benefits of Corporate Trustee Sell Sheet](#)

[Report Cover - Horizontal](#)

[Report Cover - Vertical](#)

Advisory Services

OCB [Company Story](#) *
Waterfall Piece *

GPS Specific:

[GPS – Planning Process \(sell sheet\)](#)

[GPS – Journey](#)

[GPS – Executive Summary Sample](#)

[GPS - Financial Plan Samples](#)

[GPS – Private Digital Vault](#)

Business Valuation

[Sell Sheet *](#)

[Landing Page](#)

[Biz Equity Samples](#)

Business Exit Planning:

[Exit Planning Content Series](#)

E-money Update/Client Update

Financial Plans

Executive Summary

Executive Summary Template (dept)

GPS Fact Finder (dept)

Private Digital Vault

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Supporting Collateral

Thought Leadership:

[Marco & Markets](#) / [Trading Perspectives Podcast](#) / [Common Cents](#) /
Grey Folders
QR code scan cards for events *

Shareholders:

[Trading Oakworth Capital Inc.](#) * / [Earnings Releases & Shareholder Reports](#) -

Specializations:

[DRIVE Sell Sheet](#) / [DRIVE Script and Training PPT](#)
[DEPTH](#) -
[Dryus Sell Sheet](#) / [Dryus Script and Training PPT](#)

Market Specific:

[Middle Tennessee Look Book](#) -
[Central Carolinas Digital / Print Look Book](#) *-
[South Alabama Look Book](#)
[Market Board Lists](#)

Corporate Communications:

[Client Testimonials](#)
[Oakworth Company Store](#)
Talent pitch Decks for recruiting, board and investors ^
Media Book *^
Videos: [Founders](#)/[Culture](#)/[Oakworth Joins OTCQX](#)

Related Materials:

Proposal Binding Covers and Tabs/ Folders / Wide Black Folders / DRYUS
black boxes w/new client gift elements *

Key

*One Pager / Print

**In Development 2024

- Digital Asset

+ Training Guide Available

^ Marketing Held Asset Only