One Trusted Team With a Comprehensive View

The Wealth Management Group of Guaranty Bank & Trust, N.A.

Provide. Protect. Pass.™

At any point in time, these three simple words define one's financial future and legacy. Provide for loved ones. Protect your assets. Pass values and assets to the next generation and beyond. To whom would you want to give the responsibility for deciphering and administering the complexities of your financial life today and for generations to come?

Throughout the country, clients give that responsibility to the Wealth Management Group of Guaranty Bank & Trust. A 100-year-old banking institution situated in Northeast Texas, Guaranty is large enough to be ranked among the nation's top 10 percent by bank asset size, yet personal enough to provide individualized wealth management expertise within one cohesive group.

"The Wealth Management Group's philosophy is simple and straightforward. In every situation, we do what is right for the client." —M. J. Trusty, JD, CTFA

Diversity. Philosophy.

Guaranty's Wealth Management Group works with individuals, families, philanthropic organizations and business entities. Its professionals analyze, evaluate, and address each client's diverse financial world—a world that may include unique assets such as businesses, art, minerals and real estate in addition to conventional investments of stocks, mutual funds and bonds. This requires a dedication to the success of both the client and the group.

With over 40 years of experience, Chief Fiduciary Officer M. J. Trusty, JD, CTFA understands philosophy and resources are important to that success. "The Wealth Management Group's philosophy is simple and straightforward. In every situation, we do what is right for the client. The Bank stands behind us, as employees, and believes in what we do. With a fiduciary responsibility and strong financial resources, we offer the kind of personalized service that's often lost these days."

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Experience. Success.

Guaranty's senior officers have well over 120 years of combined experience. Chief Investment Officer Andrew Hoeniges, Chartered Financial Analyst and MBA, and Jennifer Jefferies, Vice President and Manager, JD, MSFS, believe comprehensive wealth management is a holistic discipline. All aspects of one's financial life cycle are interdependent; when a question or life-changing event alters the cycle, new concerns as well as new opportunities arise.

Helping family businesses like Phillips Forest Products build beautiful art and legacies.

The Wealth Management Group's experience and expertise helps individuals, families, and businesses move through this cycle, thus achieving generational success. "Clients tell us," says Senior Vice President Lacy McMillen, "they have a sense of confidence and peace when we guide them through this process—provide, protect, and pass—from beginning to end."

Guaranty Bank & Trust
Wealth Management Group

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