Direct Response: Prospect Letter from MB Financial Bank Personal Trust

mb financial
bank

September 9, 2013

We know that serving your clients well is your most important priority. We feel the same way.

Dear ____________________:

For over 100 years MB Financial Bank has been offering attorneys and their clients customized and comprehensive wealth management services, providing investment management and trust solutions for your needs and those of your clients.

With over $3.6 billion in assets under administration, MB's Personal Trust and Guardianship Services team has the expertise and experience you and your clients need. You'll find us an excellent resource for marital and family trusts, generation-skipping trusts, charitable lead and remainder trusts, foundations, guardianships, special needs trusts, decedents' estates, investment management accounts and individual retirement accounts.

Whether your clients want to implement integrated wealth management plans or enhance existing plans with select individual MB offerings, we ensure them the same high level of personal attention they experience with you. In addition, our wealth management team in Oak Brook makes our services easily accessible to those in the western suburbs of Chicago and beyond.

We welcome the opportunity to discuss how MB's wide range of wealth management services can help you and your clients now and in the future. Please feel free to contact us if we can be of any assistance or if you have any questions about our wealth management services.

Mike Nylen, our Senior Personal Trust Advisor whose offices are located at our Oak Brook Banking Center, is a seasoned trust professional with years of experience in partnering with clients and their legal advisors. Mike is available to meet with you and with your clients at your offices or at our Oak Brook Banking Center located at 1400 16th Street in Oak Brook.

We thank you for your consideration and look forward to opportunities to work together.

Sincerely,

Sally Larson Sargent
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Client: Mike Nylen and Sally Sargent - MB Bank Personal Trust Department

Objective: To connect with attorneys and guardians of wealthy individuals who are in a position to recommending MB's services to their clients.

Strategy: Send a warm, personal letter to a select group of attorneys whose clients are likely to need a personal financial advisor.

Media: Personalized letter followed by a personal phone call.

Results: This campaign was developed shortly before I left and I don't have any hard data on its success.