**Bank Concierge Services Verification Form**

This agreement by and between bank manager/private banker of **NAME OF** bank and **TRUST NAME** (known as the account holder herein) describes the benefits to be provided by said Bank to the account holder.

| **Bank**  |  | **Benefits** |
| --- | --- | --- |
| **Initials** |  |  |
|  |  |  |
|  |  | **Health Insurance** - to cover the signatory/depositors and families |
|  |  |  |
|  |  | Concierge Services 24/7 based on AUM. |
|  |  |  |
|  |  | VIP transportation & Limousine based on AUM in a tier grid. |
|  |  |  |
|  |  | First Class seats on commercial airlines based on AUM in the tier grid. |
|  |  |  |
|  |  | Private Jet Travel (5-25 flight hrs. per mo.) based on AUM in a tier grid on flight hours per month. |
|  |  |  |
|  |  | Private Yacht access/usage (40 hrs. annually) based on  AUM in a tier grid on access/usage hours per year. |
|  |  |  |
|  |  |  Suites at Luxury Hotels & VIP Dinners at Restaurants based on AUM. |
|  |  |  |
|  |  | Spa & Massage Club Membership based on AUM in a tier grid. |
|  |  |  |
|  |  | Membership fee & Annual fees to Exclusive Resorts & Residences for up to 60 days with Priority Holiday Access annually. |
|  |  |  |
|  |  |  |
| \_\_\_\_\_\_\_\_\_ |  | Provide free Executive Privacy Plus subscription with Reputation.com. |
|  |  | Membership fee & Annual fees to Inspirato Core resorts & residences. |



**Provide any and all other perks that was not mentioned:**

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|  |

ACKNOWLEDGEMENT: I acknowledge that by my initials on the items listed above, that these benefits will be provided to the account holder as listed above.

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Bank Signature date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

NAME, Ex. Trustee for TRUST NAME date

Account Holder Signature