

MIDWEST HERITAGE

A Hy-Vee Company

Welcome to Hy-Vee Private Banking. **You've earned it.**

As a Hy-Vee employee, we know how hard you work. That's why we are excited to share that you have the opportunity to take advantage of staff and stockholder exclusive products and services designed to help you meet your goals and enjoy what you've worked for in your career. We're also proud to offer flexible hours of service, along with online and mobile banking options to match your busy schedule.

Private Banker Checking

- No monthly service charge
- Flexible debit card limits
- Online/mobile banking
- Remote deposit capture
- Zelle®
- Overdraft protection

Exclusive Borrowing Solutions

- Private banking line of credit
- Numerous mortgage options
 - Purchasing
 - Refinancing
 - Stockholder mortgages
- Home equity loans or lines of credit
- Auto/recreational loans

At Hy-Vee, we're committed to making sure our customers have an outstanding experience every time they shop our stores. That's the same commitment Midwest Heritage shares with every customer they serve.

Jeremy Gosch
President, Chief Operating Officer, Hy-Vee, Inc.

Contact us to schedule an appointment and learn more about private banking.



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mhbank.com/hy-vee/private-banking



Dream Big. Plan Smart.

We know you're not just planning for today – you're planning for the future. With Midwest Heritage, you will receive personalized service specific to your financial needs and goals. We also partner with 15+ insurance agencies to get you the best rate while protecting your assets.

Building and Growing Wealth

- Hy-Vee stock projections
- 401(k) and benefits review
- Investment certificates

Financial Planning

- Retirement and investment planning
- Tax and estate planning strategies
- Legacy protection and wealth transfer
- Charitable giving
- Budgeting and debt review

Investment Management

- Full-service investment management
- IRA and Roth accounts
- Annuities and income planning

Insurance Services

- Auto
- Home
- Renters
- Landlord
- Recreational Vehicle
- Umbrella
- Life
- Income Protection
- Long-Term Disability



We take a consultative approach to our clients' needs and find the right solution to fit each unique plan.

*Matt Watters, CFP®, ChFC®
President & CCO
Midwest Heritage Financial Advisors*



Contact us to schedule an appointment and learn more about our wealth management and insurance services.



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