

# Important Notice.

Private Banking



Dear Clients,

We write to advise you of an important step that we have taken today.

With the approval of the Bermuda Monetary Authority (BMA), we announce the amalgamation of Capital G Investments with Kast Investment Management Limited (KAST). We are very pleased with this development as it represents a significant step in our evolution as a leading provider of integrated wealth management services.

Formed in 1991 by Anne Kast, KAST is well known to many of you. KAST has developed a reputation for delivering a high level of client service. Along with a disciplined investment approach, KAST has enjoyed successful growth over the last 20 years. Its clients comprise private clients, trusts and institutional clients both domestically and globally. Our combined organizations now manage in excess of \$650M, across all asset classes and possess strong relationships with top-tier managers including GAM, Schroders, Barings, Fidelity, Orbis and JP Morgan Fleming to name a few.



**From left to right: James Gibbons - Chairman of Capital G Bank Limited, Anne Kast - President of Kast Investment Management Limited, Joel Schaefer - President and CEO of Capital G Investment Limited and John Kephart - President and CEO of Capital G Bank Limited and Capital G Trust Limited.**

We are very pleased that Anne is now a part of Capital G, as she brings this wealth of experience to us. Anne Kast will remain as President and Investment Manager of Kast Investment Management, now a subsidiary of Capital G Investments, continued to be supported by Mr. Colin Furr, who will remain as Vice President, Operations of KAST – both are considered pivotal to the successful integration of the two companies.

This amalgamation represents the careful execution of our long term strategic plan to advance our investments and private banking businesses, affording our discerning client base access to top tier investment advisors via a robust open architecture platform, and well qualified professionals dedicated to the provision of exceptional client service.

We recognize that the management of your assets, particularly in this environment, demands strength, stability, innovation and a banking relationship you can trust. This is our commitment to you.

Join us in welcoming Anne and Colin to the team and KAST clients to the Capital G Family.

Please feel free to call us should you have any questions about this exciting development.

Regards,

Barbara R. Tannock, CFA  
SVP, Head of Private Banking  
Capital G Bank Limited

Joel P. Schaefer, CFA  
President & CEO  
Capital G Investments Limited

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