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# INVESTING RESOURCES

Enjoy access to our premium tools and comprehensive research to help you easily find the right investments for your portfolio.



# Specialized Tools for Smart Investing

With your BancWest Investment Services account, you'll enjoy access to a robust selection of tools and resources.

## Retirement Income Calculator

Create your retirement plan with this helpful calculator that gives you a view of your retirement savings balance, withdrawals for each year and more.

Here's a sample selection of other tools that you'll be able to use once you have a BancWest Investment Services account:

### [Investment Goal Calculator](#)

Enter an initial investment amount, the number of years you'll be saving, and a few other criteria to find out how much you may need to save to reach your goal.

### [Asset Allocator](#)

Determine the mix of stocks, bonds and cash that meets your requirements, such as your risk tolerance, current assets and annual savings.

### [Screeners](#)

Find mutual funds, exchange-traded funds (ETFs) and stocks according to your preferences, including performance, fundamentals and risk.

### [Comprehensive Company Profiles](#)

Get quotes, recent news, earnings, analyst reports, financials and other information on companies listed on the major stock exchanges.

## BancWest Top Picks<sup>SM</sup>

Take the guesswork out of finding the right funds for your portfolio with our researched list of ETFs and no-load, no-transaction fee mutual funds powered by Morningstar<sup>®</sup>



### Enjoy integrated online investing and banking


Easily view and manage your investment and Bank of the West accounts<sup>2</sup> online from a single screen.

## Review these Additional Resources

For more tips and information on investing and trading, visit [Investor Education](#).

Not sure what a specific financial term means? Go to [Frequently Used Financial Terms](#).

To download and print account applications and other forms, go to our [Forms](#) page.

<sup>1</sup>Opening a Bank of the West Premier Checking account requires a minimum opening deposit of \$500. The \$30 monthly service charge will be waived for your first two (2) statement cycles and may be waived thereafter when you maintain at least \$75,000 combined average monthly balance per statement cycle in this Bank of the West Premier Checking account plus other eligible personal Bank checking, money market, savings, CDs, and IRAs, and prior end-of-month account balances in eligible BancWest Investment Services investment accounts. Deposit and loan products are offered by Bank of the West. Member FDIC. Equal Housing Lender. 

Fifteen (15) \$0 commission order executions for equities and Exchange-Traded Funds ("ETFs") per calendar month, per account (\$6.95 order executions thereafter), for self-directed orders placed via the BancWest Investment Services online platform, subject to certain terms and conditions and additional fees (please refer to <https://www.bankofthewest.com/personal-banking/investments/self-directed-investor.html> for further details about self-directed investing available through BancWest Investment Services). If an order placed via the online platform is executed over multiple days, each day's executions for that order will be counted separately and applied against the remaining available \$0 commission order executions available that month.

<sup>2</sup>Deposit and loan products offered by Bank of the West, member FDIC.

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# Get Started Now

[Open an Account](#)

Get assistance or request a complimentary consultation



1-888-808-2947

Monday - Friday  
5 a.m. - 9 p.m. PT



[Email us](#) ›

## 15 Trades Every Month

Bank of the West Premier customers qualify for 15 commission-free trades each month.

[Learn More](#)

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**Investment and Insurance products:**

NOT FDIC INSURED	NOT BANK GUARANTEED	MAY LOSE VALUE	NOT A DEPOSIT	NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY
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