

WHAT KIND OF INVESTOR ARE YOU?

Invest the Way that Works Best for You

Whether you like to do your own online investing or prefer the guidance of an experienced professional, BancWest Investment Services offers a wide range of options to help you achieve your financial goals.

Self-Directed Investor

- You're comfortable doing your own investment planning and portfolio management.
- You consistently review your portfolio.
- You prefer doing your own market research.
- Execute your own trades.

[Learn more about self-directed investing ›](#)

Advisor-Assisted Investor

- You want professional help with investment planning and portfolio management.
- You prefer to have a professional assist you with regularly tracking your portfolio.
- You want professional research and guidance on investment options.
- You prefer that a professional help implement your investment strategy.

[Learn more about advisor-assisted investing ›](#)



Enjoy integrated online investing and banking

Easily view and manage your investment and Bank of the West accounts¹ online from a single screen.

Related Articles

[Stocks vs. Other Investments \(PDF\)](#)

[Stocks and Taxes \(PDF\)](#)

[Mutual Funds or ETFs: Which to Choose \(PDF\)](#)

[Investing for the Long Run \(PDF\)](#)

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

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](#)

¹Deposit and loan products offered by Bank of the West, member FDIC.

²Opening 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.

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This is not an offer or solicitation for brokerage services, investment advisory services, or other products or services where we are not authorized to do business or where such offer or solicitation is contrary to the securities laws or other local laws and regulations of that jurisdiction.

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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