

ADVISOR TRUST SERVICES

Corporate snapshot

KEY STATISTICS

Assets	\$49.2 billion
Loans	\$23.2 billion
Deposits	\$33.3 billion
Assets under management or administration	\$103.6 billion

BOKF, NA (BANK) LONG-TERM ISSUER CREDIT RATINGS**



12.13%
TIER 1
CAPITAL RATIO

6.0%
IS WELL
CAPITALIZED



**100+ YEARS OF
FINANCIAL SERVICES**



5,000+ EMPLOYEES



**TOP 30
U.S.-BASED BANK***

OUR RICH HISTORY

1910

Founding of Exchange National Bank of Tulsa

1918

Established trust division

1949

Opened investment management services

1991

Launched an investment adviser & brokerage firm

2010

Opened institutional office in Milwaukee, WI

2015

Opened corporate trust office in St. Louis, MO

2014

Acquired GTRUST Financial Corp., a Kansas-based independent trust and asset management company, and MBM Advisors, a Houston-based RIA

2012

Acquired The Milestone Group, Inc., a Denver-based RIA

2011

Opened corporate trust offices in Lincoln, NE and Austin, TX

2016

Acquired assets from Weaver Wealth Management, a Dallas-based RIA, opened an institutional office in Stamford, CT

2018

Acquired CoBiz Financial, Inc., a Denver-based commercially-focused bank with presence in CO and AZ

2019

Opened corporate trust office in Indianapolis, IN

2023

Opened an Institutional office in Memphis, TN.

TODAY

The Wealth Management division serves individual and institutional clients globally from offices in 12 states



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