

Altruist Financial LLC Participating Bank List

Altruist Financial LLC



Participating Banks for **individual or joint accounts** in Altruist Financial LLC's ("Altruist") **Altruist Cash Program** as of March 28, 2025:

- C3bank (Cert # 25249)
- Citibank, N.A. (Cert # 07213)
- Farmers & Merchants Bank (Cert # 16810)
- First Foundation (Cert # 58647)
- Freedom Bank of Virginia (Cert # 57184)
- HSBC Bank USA, N.A. (Cert # 57890)
- Pinnacle Bank, TN (Cert # 35583)
- State Bank of India (Cert # 33682)
- Third Coast Bank (Cert # 58716)
- Toyota Financial Savings Bank (Cert # 57542)
- Truist Bank (Cert # 09846)
- Union Bank and Trust (Cert # 13421)
- Wells Fargo Bank, N.A. (Cert # 3511)

Excess Banks as of March 28, 2025:

- Wells Fargo Bank, N.A. (Cert #3511)
- Pinnacle Bank, TN (Cert # 35583)

Please see the Altruist Cash Program Disclosure Statement for complete details about the Programs. Altruist utilizes BNY Mellon as the intermediary bank for the operation of the Programs, subject to change at any time. This list may change at any time at Altruist's discretion. You may exclude any Participating Bank from holding your funds at any time by contacting Altruist.

Recent changes to the participating bank list:

Bank	Change	Effective Date
HSBC Bank USA, N.A.	Bank added	December 4, 2024

Upcoming changes to the participating bank list:

Bank	Change	Effective Date
Bank Hapoalim	Bank to be added	Coming Soon

Participating Banks for **trust accounts** in Altruist Financial LLC's ("Altruist") **Altruist Cash Program** as of March 28, 2025:

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- Citibank, N.A. (Cert # 07213)
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Participating Banks for **individual or joint accounts** in Altruist Financial LLC's ("Altruist") **Bank Sweep Program** as of March 28, 2025:

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Excess Banks as of March 28, 2025:

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Please see the Altruist Bank Sweep Program Disclosure Statement for complete details about the Programs. Altruist utilizes BNY Mellon as the intermediary bank for the operation of the Programs, subject to change at any time. This list may change at any time at Altruist's discretion. You may exclude any Participating Bank from holding your funds at any time by contacting Altruist.

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HSBC Bank USA, N.A.	Bank added	December 4, 2024

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Participating Banks for **business accounts** in Altruist Financial LLC's ("Altruist") **Bank Sweep Program** as of March 28, 2025:

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Recent changes to the participating bank list:

Bank	Change	Effective Date
Truist Bank	Bank added	November 1, 2024

Upcoming changes to the participating bank list:

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Participating Banks for **retirement accounts** in Altruist Financial LLC's ("Altruist") **Bank Sweep Program** as of March 28, 2025:

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