

Altruist Financial LLC Participating Bank List



Altruist Financial LLC

Participating Banks for **all accounts** in Altruist Financial LLC's ("Altruist") **Altruist Cash Program** as of July 8, 2024:

- C3bank (Cert # 25249)
- Citibank, N.A. (Cert # 07213)
- Farmers & Merchants Bank (Cert # 16810)
- First Foundation (Cert # 58647)
- Freedom Bank of Virginia (Cert # 57184)
- Pinnacle Bank, TN (Cert # 35583)
- Third Coast Bank (Cert # 58716)
- Union Bank and Trust (Cert # 134)
- Toyota Financial Savings Bank (Cert #57542) 21)
- Wells Fargo Bank, N.A. (Cert # 3511)

Excess Banks as of June 14, 2024:

- 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
Toyota Financial Savings Bank	Bank added	June 14, 2024
Citibank, N.A.	Bank added	July 8, 2024

Upcoming changes to the participating bank list:

Bank	Change	Effective Date
State Bank of India	Bank to be added	Coming Soon

Participating Banks for **individual or joint accounts** in Altruist Financial LLC's ("Altruist") **Bank Sweep Program** as of July 8, 2024:

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

Excess Banks as of June 14th, 2024:

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

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.

Recent changes to the participating bank list:

Bank	Change	Effective Date
Toyota Financial Savings Bank	Bank added	June 14, 2024
Citibank, N.A.	Bank added	July 8, 2024

Upcoming changes to the participating bank list:

Bank	Change	Effective Date
State Bank of India	Bank to be added	Coming Soon

Participating Banks for **business accounts** in Altruist Financial LLC's ("Altruist") **Bank Sweep Program** as of July 8, 2024:

- C3bank (Cert # 25249)
- Citibank, N.A. (Cert # 07213)
- Farmers & Merchants Bank (Cert # 16810)
- First Foundation (Cert # 58647)
- Freedom Bank of Virginia (Cert # 57184)
- Pinnacle Bank, TN (Cert # 35583)
- Third Coast Bank (Cert # 58716)
- Union Bank and Trust (Cert # 13421)
- Wells Fargo Bank, N.A. (Cert #3511)

Excess Banks as of June 14th, 2024:

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

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Recent changes to the participating bank list:

Bank	Change	Effective Date
Citibank, N.A.	Bank added	July 8, 2024

Upcoming changes to the participating bank list:

Bank	Change	Effective Date
State Bank of India	Bank to be added	Coming Soon

Participating Banks for **retirement accounts** in Altruist Financial LLC's ("Altruist") **Bank Sweep Program** as of July 8, 2024:

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

Excess Banks as of June 14th, 2024:

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

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Recent changes to the participating bank list:

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Citibank, N.A.	Bank added	July 8, 2024

Upcoming changes to the participating bank list:

Bank	Change	Effective Date
State Bank of India	Bank to be added	Coming Soon