

A Closer Look at Our Clients

Jack and Stephanie McFarland

Vancouver, Washington

JACK MCFARLAND, DMD, HAS BEEN PRACTICING DENTISTRY IN VANCOUVER, WASHINGTON, for more than 40 years. Five years ago, when he sold the practice to his associate and switched to a two-day-a-week schedule, he sought a single place to put his pension, profit sharing funds and investments.

“I had funds in several different places and I wanted to consolidate,” said McFarland. “I talked to various banks and money management firms and eventually decided on West Coast Trust.” McFarland’s dental practice used West Coast Bank for business banking services so he felt right at home with West Coast Trust.

“I was confident in the management and the investment advisors, I liked the people and I liked the way they responded quickly to any question I had,” McFarland said. “I’m very much a one-to-one person, and I know they have many customers who are much bigger fish, but I feel they’ve been just as attentive to me as to someone with millions of dollars.”

McFarland and his wife Stephanie have quarterly meetings with West Coast Trust to review their investment portfolio. Between meetings, they monitor their accounts online. “There’s very good electronic access to our accounts so we can

check them any time of the day or night. The system is user-friendly, the graphs are easy to interpret and we can even track the performance of individual stocks,” he said.

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Stephanie McFarland was so pleased with her experience at West Coast Trust that she set up an investment account of her own. She works in her family’s furniture store, which has been a local, family-owned business for more than 100 years. “I’m not as experienced with all the financial ins and outs, but they explain everything and make it easy to understand,” she said. Her satisfaction with West Coast Trust led to another referral—her 82-year-old mother.

“A representative of West Coast Trust met with her at home and she decided to start an investment portfolio. The world of finance can be a bit intimidating, but they made it very comfortable for her.”

In addition to the personal service, the McFarlands are also impressed with West Coast’s commitment to the local community. “We’re both very involved in this community, and West Coast Bank and West Coast Trust are involved in a lot of things that happen here, as well,” Jack McFarland said.

Having their investments managed by West Coast Trust gives the McFarlands a sense of security and allows them to enjoy other pursuits. “I have a 360-degree comfort level with them,” said Jack McFarland. “I’ve dealt with a lot of different banks in 40 years and I have a lot of confidence in West Coast.”