



Lincoln
SAVINGS BANK

At the end of the day, I find satisfaction in taking the complexities of retirement plans and making them easy for my clients to understand.

AN INTRODUCTION

Since joining the LSB team over 20 years ago, it's been a privilege to be a part of this progressive organization. I have a strong connection to LSB and its rural roots since I, too, have rural roots, having grown up on a farm in northwest Iowa. Outside of work I enjoy volunteering as a director for my local library, pitching in at the food bank and helping out the Friends of Iowa Public Radio. When I need to decompress and get away from it all, I can be found kayaking, taking a jog or simply reading on my back porch with coffee in hand.

COMPANY OVERVIEW

Inspired by the authenticity of Abraham Lincoln, Lincoln Savings Bank invests in long-term relationships that require continuous commitment and expertise.

Founded in 1902 as an employee-owned organization, Lincoln Savings Bank has over 100 years of personalized and professional financial experience to suit your needs. You can feel the difference in the expert service you receive from people who truly understand what it means to be a community banker. And like Abe, we're forward-thinking, innovative, and passionate about what we do.

BETTER TRUST SERVICES

We all have a vision for the legacy we leave. We want to ensure our loved ones, communities and charities benefit from the wealth we have accumulated over a lifetime of hard work. Without professional planning in advance of retirement or death, your legacy may be at risk.



KATE PETERSEN, CRSP

VP | Retirement Plan Services
& Trust Officer

CONTACT INFORMATION:

242 Tower Park Dr
Waterloo, IA 50701
office: (319) 233-1900
fax: (319) 236-1070
KateP@myslb.com

CREDENTIALS:

- BS- Iowa State University
- Certified Retirement Services Professional- Institute of Certified Bankers
- Cannon Financial Institute- Employee Benefits School
- Over 25 years Financial Services Experience

SPECIALIZED TRUST SERVICES:

When you partner with Lincoln Savings Bank for trust services, our goal is to ensure your legacy is honored. We take time to learn about your vision, understand your goals, provide professional expert guidance, and work tirelessly on your behalf to build and execute a plan according to your wishes.