



COMMUNITY

IMPACT

REPORT

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UNITED BANK & TRUST

MISSION, VISION & CORE VALUES

MISSION

**CUSTOMER FOCUSED,
LOCALLY EMPOWERED &
TEAM MEMBER DRIVEN**

VISION

**BANK OF CHOICE.
EMPLOYER OF CHOICE.
ONE INTERACTION AT A TIME.**

CORE VALUES

**EXCELLENCE OWNERSHIP
INTEGRITY COMMUNITY**



UNITED BANK & TRUST

**EXCEEDING
YOUR EXPECTATIONS**

MESSAGE FROM OUR PRESIDENT

Dear valued customers and community members,

Since opening in 2002, United Bank & Trust has taken pride in being a community bank and serving the communities in which we are located and surrounding areas. Our decisions are made locally by our team of employees and board of directors who live and work in the communities we serve.

Being a community bank is not just a descriptor to identify a local bank, it is one of our core values. We believe that supporting the community through charitable contributions and volunteer efforts are crucial to the betterment of our community. Our employees are encouraged to join non-profit boards, participate in community activities, and volunteer their time to help others. All these things together enable the bank to make a contribution toward a stronger community.

Additionally, we support growth of commercial and agricultural businesses by providing valuable resources, guidance and financing. This has led to the opening or expansion of numerous businesses in the Marshalltown community. The efforts by entrepreneurs create a more vibrant community in which new products and services are offered to the residents of Marshalltown.



Robert Thomas
President & CEO

Non-profit funding is also a priority of ours. Keeping local organizations viable is crucial in providing services and programs to residents. We assist non-profits in many ways; through financing, and by managing trust and foundation accounts, whereby the income is distributed in the form of donations.

We invite you to read more about our contributions and efforts in our 2024 Community Impact Report. We believe you'll quickly see why "Community" is one of our core values.

As always, we appreciate and thank you for your continued trust and support.

Respectfully,



UNITED BANK & TRUST

**EXCEEDING
YOUR EXPECTATIONS**

BOARD OF DIRECTORS



Doug Beals
Attorney, Moore, McKibben,
Goodman & Lorenz



Gabriela Vargas-Avalos
Owner, Abarrotes La Salud



Jeff Rasmussen
Owner, Rasmussen Tax &
Accounting



Marty Mitchell
Owner, Mitchell Family
Funeral Home



Kevin Swartz
Retired CEO, Wolfe Eye
Clinic



John Nelson
President & CEO, Ames
National Corporation



Robert Thomas
President, United Bank &
Trust



Sam Upah
Vice President and Senior
Lender, United Bank &
Trust

OUR LOCATIONS



Main Location
2101 S. Center St. Marshalltown

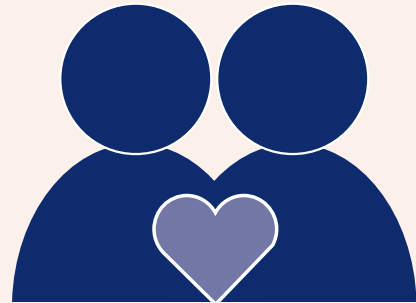


Branch
29 S. Center St. Marshalltown

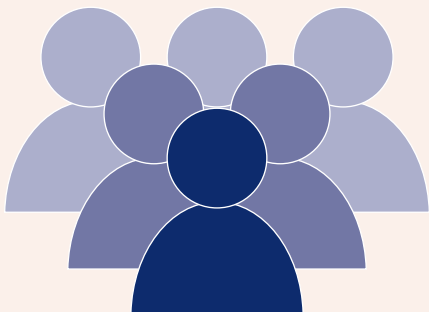
COMMUNITY ENGAGEMENT



860
Volunteer
Hours



Over 20
Organizations
Served



100 %
United Way Employee
Participation



UNITED BANK & TRUST

EXCEEDING
YOUR EXPECTATIONS

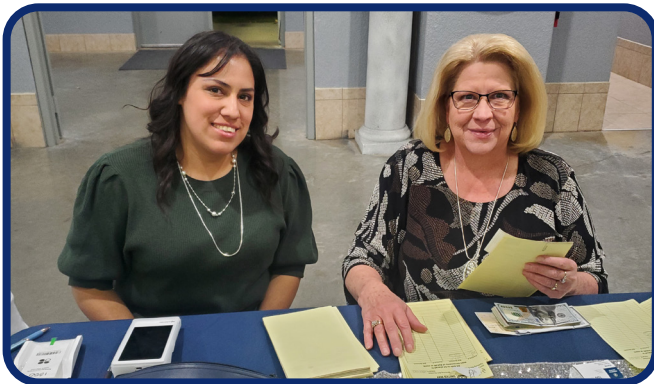
COMMUNITY ENGAGEMENT



Robert Thomas & Christian McMurray
Serving rootbeer floats to residents at Village Coop



Jennifer Hass, Brianna Pieper, Chris Arment and Cathy Dunham
Volunteer Day at Marshalltown Animal Rescue League



Wendy Gonzalez Mares & Mary Bryant
United Way's Power of the Purse payment processing



Wendy Gonzalez Mares, Brandi Morris, Robert Thomas
Radio Z's Community Turkey Handout



United Bank & Trust Staff
Oktoberfest Parade



United Bank & Trust Staff
Customers Appreciation Picnic



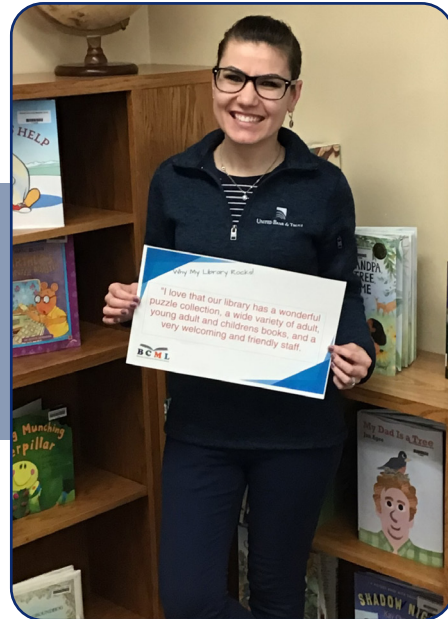
United Bank & Trust Staff
Community Shred Day



Christian McMurray, Wendy Gonzalez Mares & Brandi Morris
Iowa River Hospice Golf Outing

BOARDS & ORGANIZATIONS SERVED

- ▶ Animal Rescue League
- ▶ Beaman Community Library Board
- ▶ Child, Adolescent, and Parent Support
- ▶ Chapter MJ, PEO
- ▶ Farm Bureau
- ▶ Frank Pierce Trust
- ▶ First Methodist Endowment
- ▶ Isaak Walton League
- ▶ House of Compassion
- ▶ Marshalltown Central Business District
- ▶ Marshalltown Chamber of Commerce



Ilona Roelsgard, Teller
Beaman Library Board Member



Sarah Gerstandt, Retail Banking Officer & **Austin Gillis,**
Marshalltown Animal Rescue League Director

- ▶ Marshall County Compensation
- ▶ Marshall County Condemnation
- ▶ Marshalltown Youth Foundation
- ▶ Noon Optimist Club of Marshalltown
- ▶ Our Sacred Space Inc
- ▶ Pilgrim Heights
- ▶ Retail Task Force
- ▶ Rotary Foundation
- ▶ The Frank Pierce Trust
- ▶ United Way
- ▶ YSS



UNITED BANK & TRUST

**EXCEEDING
YOUR EXPECTATIONS**

CHARITABLE GIVING

United Bank & Trust supports community outreach activities that have lasting value. We take pride in our company and employee efforts to support the growth, success and sustainability of our communities.

- ▶ Animal Rescue League
- ▶ Child, Adolescent, and Parent Support
- ▶ Marshall County Extension- Food Pantry
- ▶ Marshall County Pork Producers
- ▶ Marshalltown Girls Softball Association
- ▶ Marshalltown YMCA- YWCA
- ▶ Marshalltown Arts & Civic Center
- ▶ MCC Foundation- Scholarship
- ▶ Pilgrim Heights
- ▶ United Way
- ▶ Unity Point Foundation- Marshalltown
- ▶ Youth & Shelter Services (YSS)



Robert Thomas, President & Sam Upah, VP & Senior Lender
Receiving recognition on behalf of the bank for achieving 100% employee participation in the United Way campaign for the 4th consecutive year.

\$12,000

DONATED TO OUR COMMUNITY IN 2024



UNITED BANK & TRUST

**EXCEEDING
YOUR EXPECTATIONS**

LASTING LEGACIES

Distributions from foundation and trust accounts benefit our community tremendously. Scholarships are awarded to local students for post-secondary education, and donations are given to non-profit organizations to provide programs and services to local residents.

**Scholarships
Awarded in the past
3 years**

\$387,557

133

**Total
Recipients**

30

**Total
Non-
Profits**


**Local Non-Profit
Support in the
past 3 years**

\$86,019



UNITED BANK & TRUST

Member FDIC

 (641) 753-5900

 www.bankubt.com