



SPRING

Platinum Adventures[®] Newsletter

SPRING 2024 | DAY TRIPS | EXTENDED TRIPS | SEMINARS | AND MORE!

MESSAGE FROM THE DIRECTOR

Let's spring forward to warmer days and good times with friends.

We've planted a garden full of good cheer, and new activities are blooming. For those who are energized and ready to explore, we've got a budding list of places to visit and things to see across the country. We've also sprinkled in some educational seminars and day trips sprouting up locally. Invite a friend to come along to see what Platinum Adventures is all about.

If you're curious about events happening near friends or family members, visit wintrust.com/panewsletters to see Platinum Adventures events planned at all Wintrust Community Banks. Events and extended trips fill up quickly; be sure to reserve a spot right away for the activities you are interested in.

Reservations are required for all events. For reservations to be confirmed, payment must be made by credit card or received in my office within seven days after reservations are made: Wintrust Banking Center, 3401 Tamiami Trail North, Naples, FL 34103. Please make checks payable to Platinum Adventures. Member pricing is for current Platinum Adventures members only.

I look forward to seeing you soon!

Dina Holland



For more information about any of the events you see in this newsletter or to RSVP, please contact me:

Dina Holland
239-687-5206
cholland@wintrust.com





DAY TRIPS

You'll have the unique opportunity to explore the wonders we have nearby. We carefully plan each of our day trips, events, and seminars to ensure they are packed with as much adventure and education as possible. Plus, each event offers a great chance to share just what the Platinum Adventures Club is all about with friends.

Pay close attention to the means of transportation for these trips. Often, we will gather and transport the group by bus, but some events require you to commute on your own. As always, if you have any questions about these day trips or would like to RSVP, contact your bank's Platinum Adventures director at the phone number or email listed in this newsletter.

For more information on any of these upcoming **day trips**, contact your Platinum Adventures director.

WEDNESDAY, MAY 29

The Family Love Letter: What Will Yours Say?

EASY 1 2 3 4 5 **ENERGETIC**

Wintrust Banking Center
3401 TAMIAMI TRAIL NORTH | NAPLES

What legacy do you want to leave for the ones you love? Have you thought about the memories you want to share with the people that matter the most? Join us as Wintrust Investments First Vice President Nina Azwoir discusses structuring your financial planning and updates on legislation that could affect your plan. Be prepared and leave behind love, smiles, and great memories. Appetizers and bubbly will be provided.

TIME: 5 TO 6:30 PM

COST: Members & Non-Members | FREE



WEDNESDAY, JULY 3

Red, White, and Blue Celebration

EASY 1 2 3 4 5 **ENERGETIC**

Wintrust Banking Center
3401 TAMIAMI TRAIL NORTH | NAPLES
26851 S. TAMIAMI TRAIL | BONITA SPRINGS

Flags are waving; sparks will fly! Stop by the bank as we celebrate the Fourth of July and enjoy refreshing ice cream while supplies last.

TIME: 11 AM TO 3 PM

COST: Members & Non-Members | FREE

RESERVATIONS ARE REQUIRED for all events. Reserve your spot today:

Dina Holland | 239-687-5206 | cholland@wintrust.com



TUESDAY, JULY 16 AND WEDNESDAY, JULY 17 Coin Appraisal

EASY **1** 2 3 4 5 **ENERGETIC**

Bring your old coins, proof sets, commemorative coins, and paper money to discover their worth. Numismatist Gary E. Lewis* will appraise your items. He is interested in seeing your pieces if you have something to sell. This a first-come, first-served event.

Tuesday, July 16 | Wintrust Banking Center
3401 TAMIAMI TRAIL NORTH | NAPLES

Wednesday, July 17 | Wintrust Banking Center
26851 S. TAMIAMI TRAIL | BONITA SPRINGS

TIME: 10 AM TO 3 PM

COST: Members & Non-Members | FREE

**Gary E. Lewis is not an affiliate of Wintrust.*

TUESDAY, SEPTEMBER 17 Extended Trip Preview

EASY **1** 2 3 4 5 **ENERGETIC**

Wintrust Banking Center
3401 TAMIAMI TRAIL NORTH | NAPLES

Join us for a presentation and travel the world with us! You'll hear about our exciting trips and see slideshows for great destinations we've planned for you, including New York City Holiday, Tropical Puerto Rico, Sunny Portugal, Charleston and Savannah, the Pacific Northwest, and more. You'll want to start packing your bags! Refreshments will be served.

TIME: 4:30 TO 6 PM

COST: Members & Non-Members | FREE

TUESDAY, OCTOBER 8 Early Signs of Alzheimer's

EASY **1** 2 3 4 5 **ENERGETIC**

Wintrust Banking Center
3401 TAMIAMI TRAIL NORTH | NAPLES

One of the most common signs of Alzheimer's disease, especially in the early stage, is forgetting recently learned information. Other signs include forgetting important dates or events, asking the same questions repeatedly, and increasingly needing to rely on memory aids or family members for things they used to handle on their own. Join us as a representative from the Alzheimer's Association discusses the 10 early signs and symptoms of Alzheimer's and dementia. A continental breakfast will be served.

TIME: 9:30 AM

COST: Members & Non-Members | FREE

Whether you're preparing for retirement, managing your retirement income, or planning for your family's financial security, we're here to help. Our team of experts offers the personalized attention you deserve with the financial solutions you need for every stage of your life.

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WEALTH MANAGEMENT

wintrustwealth.com

Contact Nina Azwoir at 239-687-5204 for more details.

Securities, insurance products, financial planning, & investment management services offered through Wintrust Investments, LLC (Member FINRA/SIPC), founded in 1931. Trust & asset management services offered by The Chicago Trust Company, N.A. & Great Lakes Advisors, LLC, respectively.

Investment products such as stocks, bonds, & mutual funds are:
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THURSDAY, OCTOBER 17 Easier Options for Home Ownership

EASY **1** 2 3 4 5 **ENERGETIC**

Wintrust Banking Center
3401 TAMIAMI TRAIL NORTH | NAPLES

Wintrust Banking Center Senior Mortgage Loan Professional Nancy Merzweiler will discuss easier options for purchasing a new home or refinancing your current home with various available programs. She will also review current interest rates and answer your questions about mortgages. Lunch will be served following the presentation.

TIME: 11:30 AM TO 1 PM

COST: Members & Non-Members | FREE



MORTGAGE OPTIONS TAILORED FOR YOU

Life can take you many places. Sometimes, it even leads you to a new home. That's why we're here. Our professionals can help you downsize, upgrade, or refinance. Whatever your next big decision is, we have the experience and knowledge to create a mortgage solution that's perfect for you.

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wintrustmortgage.com

Contact Nancy Merzweiler at 239-331-1557 for more details.

Residential lending provided by Wintrust Mortgage, a division of Barrington Bank & Trust Company, N.A., a Wintrust Community Bank. NMLS #449042.



FRIDAY, NOVEMBER 1 Welcome Back, Snowbirds!

EASY **1** 2 3 4 5 **ENERGETIC**

Wintrust Banking Center
3401 TAMIAMI TRAIL NORTH | NAPLES

As warmer weather and the grilling season end up north, we welcome you back to sunny Florida to enjoy the balmy temperatures! Pack up your coats and heavy jackets and settle in for a comfortable winter season down South. Join us for hot dogs, drinks, and fun, and discover what new events and trips Platinum Adventures has planned for 2025!

TIME: 11 AM TO 2 PM

COST: Members & Non-Members | FREE



FRIDAY, NOVEMBER 8 Luau in Bonita

EASY **1** **2** 3 4 5 **ENERGETIC**

Bonita Historical Society
27451 OLD US 41 RD. | BONITA SPRINGS

Trade your layers for Hawaiian-style apparel, sunshine, and warmth at the Bonita Historical Society's new tiki hut! We'll enjoy delicious barbeque and tropical drinks at our festive luau. Invite a friend and see what is new with the Platinum Adventures Club since last season!

TIME: NOON TO 3 PM

COST: Members & Non-Members | FREE

Transportation is not provided.

RESERVATIONS ARE REQUIRED for all events. Reserve your spot today:

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TUESDAY, NOVEMBER 12 Medicare Made Easy

EASY **1** 2 3 4 5 ENERGETIC

Wintrust Banking Center
3401 TAMIAMI TRAIL NORTH | NAPLES

Medicare's open enrollment period allows everyone with Medicare to make changes to their prescription drug or health plans for coverage beginning January 1, 2025. Don't delay, as the open enrollment period ends on December 7. Learn about eligibility, enrollment, and Medicare and Medicare Supplements benefits. Mitchell Dannenberg with LTCi Marketplace will discuss changes to Medicare in 2025. Appetizers and light refreshments will be served.

TIME: 5 TO 6:30 PM

COST: Members & Non-Members | FREE

THURSDAY, NOVEMBER 21 Miniature Golf Adventure

EASY **2** 1 3 4 5 ENERGETIC

Golf Safari
3775 BONITA BEACH RD. SW | BONITA SPRINGS

For almost 40 years, millions of adventurers have enjoyed playing at Golf Safari, which offers putters a challenging miniature golf course among life-sized jungle animals, tropical gardens, tiki huts, and misting waterfalls. Invite a friend and join us for a slice of fun! After a round of golf, we'll enjoy lunch at Leoni's Pizza in Bonita Springs.

TIME: 10:30 AM TO 12:30 PM

COST: Members \$20 | Non-Members \$25

Transportation is not provided.

SHOULDN'T YOUR BANK GO ABOVE AND BEYOND?

As a community bank, we believe in offering the best financial tools and exclusive deals that cater to the needs of our customers. That's why, with a Premier Checking account, we offer discounted safe deposit boxes¹ and tiered interest rates. We're committed to Naples and Bonita Springs, and we're here to serve you!

USE ANY ATM FOR **FREE**² WITH THIS
TIERED INTEREST-BEARING ACCOUNT!

PREMIER CHECKING

Only \$100 required to open. Must maintain \$10,000 average daily balance OR \$75,000 combined average relationship balance for the monthly statement cycle to avoid monthly fee.³

FREE specialty checks⁴ | Discounted safe deposit boxes¹
Waived fees on money orders and cashier's checks
Waived fees for incoming wire transfers

**PLUS,
YOU CAN GET
THIS CARD!**



Open an account today at wintrustflorida.com/premier.

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BANKING CENTER

3401 Tamiami Trail North | Naples, Florida
239-687-5200 | wintrustflorida.com

26851 S. Tamiami Trail | Bonita Springs, Florida
239-908-5985 | wintrustflorida.com

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3. Premier Checking Fees. \$25 monthly maintenance fee - waived with either i) average daily balance of \$10,000, or ii) combined average relationship balance of \$75,000 per monthly statement cycle. Fees may reduce earnings. **4. Specialty Checks.** Style & quantity restrictions apply.





EXTENDED TRIPS

Have you always wanted to explore the world but don't know where to begin to plan your travels? We have the solution for you. Let us handle all of the planning. Our extended trips offer you the chance of a lifetime to see the world as you've never seen it before. Extended trips range in length from a few days to a few weeks.

Most transportation, lodging, meals, and entertainment will be provided and thoughtfully planned out by our Platinum Adventures directors alongside experienced and highly-qualified travel professionals. Many extended trips include at-home pick-up and return and trip insurance. Sit back, relax, and join us for this rare opportunity to see the sights you never thought you'd see. If you have any questions, need more information, or want to make reservations for our extended trips, please contact your bank's Platinum Adventures Club director.

For detailed itineraries on any of these upcoming **extended trips**, contact your Platinum Adventures director.



LIMITED AVAILABILITY!

SEPTEMBER 3 – 14 Sensations of Lyon and Provence River Cruise

EASY 1 2 3 4 5 **ENERGETIC**

FRANCE

The South of France is unrivaled in its beauty, with the finest examples of French 15th-century architecture, Roman ruins, and sun-soaked vineyards at the foot of colossal mountain ranges. Spend three nights in Nice along the stunning French Riviera and enjoy a visit to Monte Carlo, the playground of the rich and famous. Then, sail the Rhône and Saône Rivers while exploring ports of call in Chalon-sur-Saône, Lyon, Tournon, Viviers, Avignon, and Arles, all the while experiencing the rich history and picturesque beauty of Southern France. Enjoy and relax on a lovely Emerald Waterways ship with first class service, delicious cuisine, onboard entertainment, and more!

COST: Starting at \$6,213 based on cabin preference. Call for pricing.

**Free roundtrip airfare from Fort Myers is offered if you book with a deposit by May 31, 2024.*

RESERVATIONS ARE REQUIRED for all events. Reserve your spot today:

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DECEMBER 8 – 11 New York City Holiday

EASY 1 2 3 4 5 **ENERGETIC**

NEW YORK CITY, NY

Let's kick off the holidays in the city that never sleeps! We'll start with a city tour where we'll see Broadway, Times Square, the Empire State Building, Central Park, Grand Central Station, and more. You'll marvel at the festive holiday window displays along Fifth Avenue and the magnificent Rockefeller Center Christmas Tree. Enjoy a performance at Radio City Music Hall featuring the famous Rockettes, as well as experience a Broadway show. This adventure is sure to get you in the holiday spirit!

COST: Members Double \$3,500 PP | Single \$4,300 PP
Non-Members Double \$3,700 PP | Single \$4,500 PP



FEBRUARY 9 – 14 | 2025 Tropical Puerto Rico

EASY 1 2 3 4 5 **ENERGETIC**

PUERTO RICO

Experience the warmth of the Caribbean next winter on a getaway to Puerto Rico! Enjoy five nights at the magnificent Caribe Hilton Hotel, which features a beautiful lagoon and beach, tropical gardens, bird sanctuary, spa, and more. Tour Old San Juan and see its historical and architectural treasures, colorful buildings, lively plazas, and parks. Visit El Morro to learn the history of this important fortification. See the sites of Ponce including the Parque de Bombas, Plaza Las Delicias, Cardona Island Light, and more. Visit El Yunque National Forest, the island's famous rainforest. You won't want to miss this tropical adventure!

COST: Members Double \$4,435 PP | Single \$5,425 PP
Non-Members Double \$4,635 PP | Single \$5,625 PP

MARCH 31 – APRIL 6 | 2025 Southern Charm

EASY 1 2 3 4 5 **ENERGETIC**

GEORGIA AND SOUTH CAROLINA

Embrace the leisurely pace and charming allure of America's southeast as you explore cobblestone streets, historic homes, and unspoiled coastline. Discover elegant Charleston and the history of Savannah with two-night stays in each city. Visit Charleston's City Market, one of the oldest public markets in America. Enjoy a trolley or walking tour of Savannah's sprawling Historic District. Spend two nights at the exclusive Jekyll Island Club, once described as "the richest, most exclusive club in the world." See sea turtle rehabilitation in action at Jekyll Island's Georgia Sea Turtle Center. Experience the unique charm and singular hospitality of America's "Lowcountry" in South Carolina and Georgia.

COST: Members Double \$4,825 PP | Single \$5,825 PP
Non-Members Double \$5,025 PP | Single \$6,025 PP

Price is guaranteed for bookings through September 23, 2024.

MAY 15 – 24 | 2025 Sunny Portugal

EASY 1 2 3 4 5 **ENERGETIC**

PORTUGAL

From the Portuguese capital, Lisbon to the sunny cliffs of the Algarve, venture along Portugal's stunning shoreline. In Évora, step inside a medieval city with Roman ruins. Enjoy a leisurely three-night stay in the Algarve region. Discover the charms of Portuguese Riviera. Explore the soft sandy beaches and classic fishing villages. Take advantage of free time to soak in the Portuguese sunshine and savor local flavors. Encounter picturesque resort towns, winding cobblestone streets, oceanfront promenades, and quaint villages of perfection. Join us as we travel to sunny Portugal!

COST: Members Double \$5,310 PP | Single \$6,110 PP
Non-Members Double \$5,510 PP | Single \$6,310 PP

Price is guaranteed for bookings through September 9, 2024.

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239-687-5200 | wintrustflorida.com



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GENERAL INFORMATION

ADDRESS FOR WINTRUST BANKING CENTER DEPARTURE SITE(S):

The bus cannot wait for late participants. Please arrive at your departure site 15 minutes prior to departure time. Refunds are not available for late or no-show participants.

Depart Naples

Wintrust Banking Center
3401 Tamiami Trail North
Naples, FL 34103

Reservation Policy For Day & Extended Trips

Reservations may be made by phone to Dina Holland at 239-687-5206 or by email at cholland@wintrust.com. For your reservation to be confirmed, payment must be in my office within seven days after reservations are made: Wintrust Banking Center, 3401 Tamiami Trail North, Naples, FL 34103. Please make checks payable to Platinum Adventures. Please remember to make your menu selections when you reserve your tour. Member pricing is for current Platinum Adventures Club members only. Refunds are not available for day trips unless there is a waitlist and Platinum Adventures can find a substitute for your reserved seat(s).

Responsibility of Wintrust Banking Center

Platinum Adventures and Wintrust Banking Center are not the source or supplier of the travel services offered, but act solely as agents for the actual suppliers of such services. Your participation in any such travel services is conditioned upon your consent to the use of those suppliers and your agreement not to hold Platinum Adventures and Wintrust Banking Center responsible should any of these suppliers: 1) fail to provide the travel services purchased; 2) fail to comply with any applicable law; or 3) engage in any negligent act or omission that causes any sort of injury, damage, delay, or inconvenience.

Your participation is also conditioned upon your agreement to review all of your travel documents, including applicable cancellation and travel insurance policies. You may contact Dina Holland at 239-687-5206 with any questions concerning required travel documents and applicable cancellation and travel insurance policies. Group travel fares typically involve restrictions, and changing any aspect of your travel arrangements may result in the payment of additional money. Cancellation or failure to attend any part of your Platinum Adventures travel, tour, or event may result in financial penalties up to and including the loss of all monies paid. A travel insurance policy may provide a remedy if you cancel for a covered reason.

Wintrust Banking Center is acting in the capacity of extending this invitation to travel to the Platinum Adventures members and their guests. Wintrust Banking Center reserves the right to refuse acceptance to anyone it judges incapable of meeting the rigors and requirements of participating in any activity or trip at any time.