



**WINTER 2020**



**PLATINUM ADVENTURES NEWSLETTER**

**DAY TRIPS • EXTENDED TRIPS • SEMINARS • AND MORE!**

## **A MESSAGE FROM THE DIRECTOR**

Our wish in 2020 is to create unforgettable memories with you. The start of a new decade is the perfect time to reflect on where we've been and where we want to go. From exploring new travel destinations to engaging seminars and events in our area, your Platinum Adventures friends will be along for the fun.

And, be sure to secure your spot today, so you don't miss out on these exciting opportunities we have in store this winter! Check off that New Year's resolution and come get involved. We look forward to seeing you soon.

Join us for an exciting calendar of events in 2020! We look forward to meeting new members at our upcoming educational seminars, day trips, or extended travel experiences. Let's have some fun!

*Tara Fedorko*



**FOR MORE INFORMATION ABOUT ANY OF THE EVENTS YOU SEE IN THIS NEWSLETTER, OR TO RSVP, CONTACT ME OR MY COLLEAGUE:**

**TARA FEDORKO**

**239-687-5201 | [tfedorko@wintrust.com](mailto:tfedorko@wintrust.com)**

**LEO SOLER**

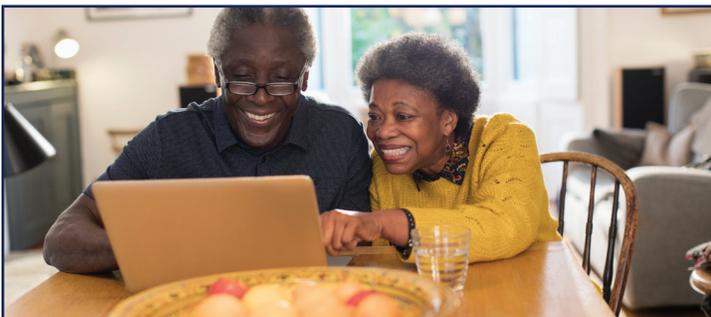
**239-687-5198 | [lsoler@wintrust.com](mailto:lsoler@wintrust.com)**

FOR DETAILED  
ITINERARIES ON  
ANY OF THESE  
UPCOMING  
**DAY TRIPS**,  
CONTACT YOUR  
PLATINUM  
ADVENTURES  
DIRECTOR.

## 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 with friends just what the Platinum Adventures Club is all about.

Pay close attention to the means of transportation for these trips. Oftentimes, we will gather and transport the group by bus, but there are some events that require you to commute on your own. As always, if you should have any questions about any of 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.



### THURSDAY, JANUARY 30

#### Tax Planning

EASY ① ② ③ ④ ⑤ ENERGETIC

#### Wintrust Banking Center

3401 TAMIAMI TRAIL NORTH | NAPLES, FL

Join us for a lunch and learn about how tax planning and exposure changes throughout the four stages of retirement. Nina Azwoir with Wintrust Wealth Management will discuss strategies for managing your retirement cash flow in a tax-efficient manner. You'll leave feeling empowered for you and your family's financial future. Lunch is included.

TIME: NOON TO 2 PM

COST: MEMBERS & NON-MEMBERS | FREE



### WEDNESDAY, FEBRUARY 5

#### "Making God Laugh"

EASY ① ② ③ ④ ⑤ ENERGETIC

#### The Naples Players

701 5TH AVE. SOUTH | NAPLES, FL

"Making God Laugh" follows one typical American family over 30 years of holidays. Starting in 1980, Ruthie and Bill's grown children all return home, where we learn of their plans and dreams as they embark on their adult lives. The empty nesters contend with their own changes, too, as old family rituals are trotted out and ancient tensions flare up. As time passes, the family discovers that, despite what we've planned for our lives, we often arrive at unexpected destinations. We will have dinner prior to the performance at Truluck's.

TIME: 5:15 PM

COST: MEMBERS \$90 | NON-MEMBERS \$95

Meet at Truluck's | 698 4th Ave. South, Naples

RESERVATIONS ARE REQUIRED FOR ALL EVENTS. PLEASE CONTACT ME TODAY TO RESERVE YOUR SPOT:

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## WEDNESDAY, FEBRUARY 19

### Estate Planning 101

EASY 1 2 3 4 5 ENERGETIC

#### Wintrust Banking Center

3401 TAMIAMI TRAIL NORTH | NAPLES, FL

Estate planning can be complex, but a well-informed plan can make all the difference. Before you begin to take action on your estate plan, it's important to understand the basics so you can address your specific needs. Join Jeanette M. Lombardi, senior counsel at Bond, Schoeneck & King, as she walks us through the basics. Light refreshments will be served.

TIME: 11:30 AM TO 1 PM

COST: MEMBERS & NON-MEMBERS | FREE



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.

**WINTRUST**  
MORTGAGE

wintrustmortgage.com

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



## TUESDAY, FEBRUARY 25

### Extended Trip Preview

EASY 1 2 3 4 5 ENERGETIC

#### Wintrust Banking Center

3401 TAMIAMI TRAIL NORTH | NAPLES, FL

Join us for a special trip presentation and travel the world with us! You'll hear all about the exciting trips and see slideshows for great destinations we've planned for you, including Iconic Israel; Portugal and The Douro River Cruise; New York City Holiday; Discover Panama; and more.

You'll want to start packing your bags! Hors d'oeuvres and refreshments will be provided.

TIME: 5 PM

COST: MEMBERS & NON-MEMBERS | FREE



## THURSDAY, FEBRUARY 27

### How Healthy Are You?

EASY 1 2 3 4 5 ENERGETIC

#### Wintrust Banking Center

3401 TAMIAMI TRAIL NORTH | NAPLES, FL

Do you want to add 10 years of health to your life? Sharon Bruno with Longevity Performance Center will debut the physical exam of the future. Longevity Performance Center specializes in proactive, precision diagnostics and regenerative therapies to extend the healthy human lifespan. The company's cutting-edge technology utilizes whole genome sequencing, advanced brain and body imaging, and next-level fitness and nutrition to prove that genes are not destiny. Learn how lifestyle and regenerative medicine can alter your DNA! Hors d'oeuvres and refreshments will be provided.

TIME: 5:30 TO 7 PM

COST: MEMBERS & NON-MEMBERS | FREE



**WEDNESDAY, MARCH 4**  
**Florida Domicile Seminar**

EASY 1 2 3 4 5 ENERGETIC

**Wintrust Banking Center**  
3401 TAMIAMI TRAIL NORTH | NAPLES, FL

Are you considering making Florida your permanent residence? Join us for this very important seminar that will review how to establish your domicile in Florida, the income tax benefits and additional advantages associated with Florida residency, and how it all relates to your estate plan. This informative presentation will be hosted by Christine Smith with Wintrust Mortgage and led by Anthony DiMora and Chris Lombardo from Woodward, Pires & Lombardo, P.A.

**TIME: 5:30 TO 7 PM**

**COST: MEMBERS & NON-MEMBERS | FREE**

SHOW THE YOUNG PEOPLE IN YOUR LIFE THAT SAVING MONEY CAN BE FUN WITH OUR

**JUNIOR SAVERS CLUB<sup>®</sup>!**




IT'S NEVER TOO EARLY TO START SAVING, AND WE'RE MAKING IT EASIER BY OFFERING

**\$10<sup>1</sup>**

when you open a new Junior Savers account<sup>2</sup> and bring this in or mention this offer<sup>3</sup>.

**1. General Bonus Information.** This Junior Savers bonus offer is not available to active employees of Wintrust Financial Corporation ("WFC") and its subsidiaries. This bonus offer is subject to change or can be withdrawn at any time and without notice. Multiple Junior Savers accounts opened and titled in the same name, will only qualify for 1 bonus payment. Your new account must be open, in the same product, and have a balance greater than zero to receive the bonus payment. The \$10.00 bonus payment is subject to IRS 1099-INT reporting and may be considered income for tax purposes for the tax year in which the bonus was paid. **2. Junior Savers account.** No minimum deposit to open. A maintenance fee of \$5.00 will be imposed every calendar month if the balance in the account falls below \$200.00 any day of the calendar month once the Junior Saver has reached the age of 22. Transaction limitations will apply. Fees may reduce earnings. **3. Bonus Qualifications.** (i) Open a new Junior Savers account; (ii) tell us you are aware of this bonus offer at account opening; and (iii) you must be under the age of 22 when you open your new Junior Savers account. After you have completed all the above bonus offer qualifications, we will deposit this bonus payment into your new account within 60 calendar days after account opening. At account opening, child(ren) must be accompanied by a parent or guardian and present a valid social security number(s). Banker instructions: Enter offer code WFC00EJ/S010 during account opening. **A listing of WFC locations can be found here: <https://www.wintrust.com/locations>**



**WEDNESDAY, MARCH 11**  
**"The Lady Demands Satisfaction"**

EASY 1 2 3 4 5 ENERGETIC

**Gulfshore Playhouse**  
755 8TH AVE. SOUTH | NAPLES, FL

Set in the mid-1700s, masterful swordplay, mistaken identities, conniving suitors, and young maidens collide in this action-packed, rollicking spoof of 18th century nobility. A wine and cheese reception will follow the show. We will meet at the front lobby entrance of the playhouse prior to the performance.

**TIME: 2 TO 5:30 PM**

**COST: MEMBERS \$55 | NON-MEMBERS \$60**  
*Transportation is not provided.*



**THURSDAY, MARCH 26**  
**Preventing Financial Exploitation**

EASY 1 2 3 4 5 ENERGETIC

**Wintrust Banking Center**  
3401 TAMIAMI TRAIL NORTH | NAPLES, FL

Anyone can be at risk for financial exploitation. Join us as Matthew Engblom, a senior personal banker, teaches us how to recognize, respond to, and reduce the risks of identity theft, along with strategies needed to protect other assets. Light refreshments will be served.

**TIME: 2 TO 3:30 PM**

**COST: MEMBERS & NON-MEMBERS | FREE**

RESERVATIONS ARE REQUIRED FOR ALL EVENTS. PLEASE CONTACT ME TODAY TO RESERVE YOUR SPOT:

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**LEO SOLER**  
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**THURSDAY, APRIL 16**  
**Shred Event**

EASY 1 2 3 4 5 ENERGETIC

**Wintrust Banking Center**

3401 TAMIAMI TRAIL NORTH | NAPLES, FL

Gather your personal, sensitive information, and we'll shred it on site for free! No plastic bags. There is a limit of three paper bags or small boxes to shred.

TIME: NOON TO 3 PM

COST: MEMBERS & NON-MEMBERS | FREE

**WEDNESDAY, MAY 20**  
**"Calendar Girls"**

EASY 1 2 3 4 5 ENERGETIC

**The Naples Players**

701 5TH AVE. SOUTH | NAPLES, FL

A group of middle-aged girlfriends in Yorkshire, England, band together in a creative venture to raise money after Annie's husband John suddenly passes away from cancer. At first skeptical, the friends decide to pose in a nude calendar, a racy move for a small English village, to fundraise for leukemia research under the auspices of the Women's Institute. The calendar takes the town by storm, raises money and eyebrows, and piques the press' interest into an international sensation beyond their wildest dreams. We will have dinner prior to the performance at Truluck's.

TIME: 5:15 PM

COST: MEMBERS \$90 | NON-MEMBERS \$95

Meet at Truluck's | 698 4th Ave. South, Naples



Whether you're planning your retirement strategies or for your family's well-being, we're here to help. Our team of experts offer the personalized attention you deserve with the financial solutions you need for any stage of your life.

**WINTRUST**  
WEALTH MANAGEMENT

[wintrustwealth.com](http://wintrustwealth.com)

Contact a financial advisor for more details.

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

Investment products such as stocks, bonds, and mutual funds are:  
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NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY

FOR DETAILED  
ITINERARIES ON  
ANY OF THESE  
UPCOMING  
**EXTENDED TRIPS**,  
CONTACT YOUR  
PLATINUM  
ADVENTURES  
DIRECTOR.



## 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 like 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 have been thoughtfully planned out by our Platinum Adventures directors alongside experienced and highly-qualified travel professionals. All extended trips that are two nights or longer include at home pick-up and return. 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 would like to make reservations for any of our extended trips, please contact your bank's Platinum Adventures Club director.



### **MARCH 8 - 13** **Arizona Getaway featuring** **Chicago Cubs Spring Training**

EASY ① ② ③ ④ ⑤ **ENERGETIC**

**PHOENIX, SEDONA, AND TUCSON, AZ**

Let's cheer on the Cubs as they prepare for the 2020 baseball season in sunny Arizona! You'll visit Sloan Park to see the Cubs play and enjoy taking in beautiful scenery and warm temperatures as we tour the Phoenix area. Highlights include Scottsdale, Sedona, and Tucson. You'll see the red rock formations in Sedona, the lush gorges and spectacular cliffs of Oak Creek Canyon, and Old Tucson Studios featured in movies and television shows that were set in the "Old West." Come along with Platinum Adventures as we escape the cold weather.

**COST: MEMBERS DOUBLE \$3,499 PP | SINGLE \$4,149 PP**  
**NON-MEMBERS DOUBLE \$3,699 PP | SINGLE \$4,349 PP**



### **MAY 19 - 28** **Iconic Israel**

EASY ① ② ③ ④ ⑤ **ENERGETIC**

**TEL AVIV, TIBERIAS, AND JERUSALEM, ISRAEL**

Explore the ancient lands and rich traditions of Israel. You'll enjoy energetic Tel Aviv, the ancient Roman capital of Caesarea, the Crusader city of Acre, and the Sea of Galilee. Visit the Church of Annunciation and Mary's Well in Nazareth, as well as the Church of the Nativity in Bethlehem. Explore the Old Walled City of Jerusalem, the Western Wall, and walk the path of the Stations of the Cross/Via Dolorosa. You'll also visit Yad Vashem, see the World Holocaust Remembrance Center, ascend to the top of the Masada fortress, and more.

**COST: MEMBERS DOUBLE \$5,709 PP | SINGLE \$6,859 PP**  
**NON-MEMBERS DOUBLE \$5,909 PP | SINGLE \$7,059 PP**

*Price subject to availability. Call for current prices.*

RESERVATIONS ARE REQUIRED FOR ALL EVENTS. PLEASE CONTACT ME TODAY TO RESERVE YOUR SPOT:

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tfedorko@wintrust.com

**LEO SOLER**

239-687-5198

lsoler@wintrust.com



LIMITED SPACE LEFT

**AUGUST 11 - 22**

## Alaska Discovery Land and Cruise

EASY 1 2 3 4 5 ENERGETIC

DENALI NATIONAL PARK AND PRESERVE,  
FAIRBANKS, ANCHORAGE, AND SKAGWAY, AK

Join us as we travel north to Alaska! You'll begin by traveling deep into Denali National Park and Preserve for an opportunity to see the region's wildlife. Ride in luxury from Denali to Talkeetna, viewing incredible landscapes from glass-ceiling railcars and an open air observation platform. Relax for seven nights and enjoy the epic Alaskan scenery from aboard one of Princess Cruises' lovely ships. We'll cruise through the Inside Passage and Glacier Bay, taking in rugged natural wonders. Along the way, we'll visit Anchorage, Juneau, Ketchikan, Skagway, and more. Don't miss out on this Alaskan adventure!

**COST: STARTING AT \$6,149 PP BASED ON CABIN PREFERENCE. CALL FOR PRICING.**

**DECEMBER 6 - 9**

## 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 \$3,140 PP | SINGLE \$3,835 PP  
NON-MEMBERS DOUBLE \$3,340 PP | SINGLE \$4,035 PP**

**FEBRUARY 11 - 19 | 2021**

## Discover Panama

EASY 1 2 3 4 5 ENERGETIC

ANTON VALLEY, CHITRÉ, PANAMA CITY,  
AND PLAYA BONITA, PANAMA

Escape the winter and discover enchanting Panama where jungle forests, diverse culture, and stunning coastlines abound. We'll take a day cruise through the Panama Canal and visit the Miraflores Visitor Center. Then we'll explore the Anton Valley, nestled in the world's second largest volcanic crater, where you'll see amazing waterfalls, wildlife, flora, and fauna. We'll also travel to the Gamboa Rainforest Reserve and visit the Emberá indigenous village, where the locals will share how they make handmade items as well as their traditional dances, music, and cuisine.

**COST: MEMBERS DOUBLE \$3,605 PP | SINGLE \$4,205 PP  
NON-MEMBERS DOUBLE \$3,805 PP | SINGLE \$4,405 PP**

*Price is guaranteed for bookings through August 11, 2020.*



## TRAVELING ABROAD?

We know life can get hectic, especially when you're preparing for a trip. To make things easier, we offer currency exchange services and have more than 80 foreign currencies on hand at our branches or available for next day delivery. When you're traveling overseas, be sure to stop at the bank first so you know you're ready for your next adventure!

**WINTRUST**  
COMMUNITY BANKS

Contact a personal banker for more details.

Banking products provided by Wintrust Financial Corp. banks.



# WINTRUST®

## BANKING CENTER

3401 Tamiami Trail North | Naples, FL 34103  
239-687-5200 | [www.wintrustflorida.com](http://www.wintrustflorida.com)



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Wintrust Banking Center is a branch of Lake Forest Bank & Trust Company, N.A. Membership is for those 50 years of age or better with a customer relationship. See a personal banker for more details.

*Proud to be part of the **WINTRUST** family*

## 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.

Wintrust Banking Center  
3401 Tamiami Trail North  
Naples, FL 34103

### RESERVATION POLICY FOR DAY & EXTENDED TRIPS:

Reservations may be made by phone to Tara Fedorko at 239-687-5201 or by email at [tfedorko@wintrust.com](mailto:tfedorko@wintrust.com). For your reservation to be confirmed, payment must be in my office within seven days after reservations are made: Tara Fedorko, 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.

### 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 agent 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 Tara Fedorko at 239-687-5201 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 canceled 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.