

# V The Heritage VISION

WINTER 2009

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## New Sumner Branch—Now Open

The permanent Heritage Bank office in Sumner is now open at 1005 Wood Avenue. The celebration for “Grand Opening Week” begins with a ribbon cutting on February 18th.

President and Chief Executive Officer Brian Vance stated, “Our primary criterion in selecting a branch location is finding a community with a strong sense of spirit and civic pride. Sumner’s character comes from its citizens getting involved to help make their town a better place to live, work and play.” Heritage Bank considers it a pleasure to be a part of and grow with the community of Sumner.



The Sumner staff, pictured from left to right: Pat Skinner, Nina Burlingame, Mandy Rawlings, Katie Willoughby, Jeanine Lucas and Ann Fish.

The next time you're in the Sumner area, stop by and say hello. They are always ready to help with all your financial needs. Contact Ann Fish, Branch Manger at (253) 671-0820 or any of our friendly staff at (253) 826-0944.

## The Next Generation of Online Banking

FinanceWorks powered by Quicken is the next generation of online banking. If you're a current user of *Heritage@Home* just login and click on the FinanceWorks tab or the “Manage Your Finances” link to begin using FinanceWorks today for FREE! If you are not a current user simply enroll and login with your new user name and password.

View a complete picture of all your accounts from over 5,000 financial institutions and creditors with one login. Ensure bills are paid on time to avoid late fees on late bill payments. With FinanceWorks, you can manage bills all in one place, regardless of how you pay them.

FinanceWorks gives you a clear bottom line so you can see more easily if you're living within your means. Identify where you are spending your money, ways to save, and track your budget.

Know how much money you really have to spend by tracking your RealBalance—an account total that includes not just cleared transactions, but upcoming transactions as well. Easy-to-read charts and downloadable reports let you visualize where your money is actually going.



Your Site, Your Savings, Your Life!

**FinanceWorks**  
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**HERITAGE  
BANK**  
the quality bank

201 5th Avenue SW  
Olympia, WA 98501

[www.HeritageBankWA.com](http://www.HeritageBankWA.com)

# Heritage HIGHLIGHTS



## Refer A Friend

What would you do with an extra \$150? We'd like to reward you for being a loyal customer. Current customers can simply pick up a referral slip from one of our 14 conveniently located branches, fill out their own information, give it to a friend and ask them to open a personal checking account at Heritage Bank. When your friend brings the slip in to open their account and uses their new Visa CheckCard within 45 days of account opening, both customers will receive a \$150 VISA® Gift Card.

## Call our Home Loan Experts for Some of the Lowest Rates in Years!

At Heritage Bank, we offer competitive loan packages custom built to fit your needs. From start to finish, our home loan experts will process your loan in-house. Whether you are looking to finance the purchase of a primary or secondary home or refinance, we have the right loan package for you. Our experienced professionals will help you every step of the way. Talk to one of our home loan experts today and turn your dream into reality.

Terry Wilson, *Mortgage Lending*,  
(360) 570-7346

Marlynnne Fulton, *Mortgage Lending*,  
(360) 705-9160

## 2008 Excellence Award

Ann Fish was awarded the annual *Donald V. Rhodes Excellence in Community Banking Award*. This award has been established and named in honor of Don Rhodes, our Board Chairman. Mr. Rhodes has encouraged an environment of success and growth through ongoing community involvement, customer focus and responsible, caring management. This year's recipient, Ann Fish, joined Heritage in 2003 with more than 13 years of lending experience, including five years of retail banking. Ann was promoted to Branch Manager of our 56th Street office in 2004, then transferred to the Sumner Branch in 2006. She has been very active in various community organizations over the years including: President of the Sumner Downtown Association, serves on the Board of Directors for the Puyallup/Sumner Chamber and Tacoma Lutheran Home, Tacoma/Pierce County Chamber, and as a Court Appointed Special Advocate for Remann Hall/Foster Children, to name a few.



## 2008 WOW-Ya! Winners

The Heritage Bank WOW-Ya! Award was created to recognize a team member who has a great attitude, exceeds customer expectations on a daily basis and goes out of their way to help others. The 2008 Individual Winners are: Sharon Himmel, *Construction Lending*; Chris Kornbau, *Spanaway Branch*; Angela Martin, *Indian Summer Branch*; Stephanie Neurer, *Marketing Department*, Melanie Tanguileg, *Business Services Department* and Marilyn Williamson, *Compliance Department*.

## Officer Promotions

We are pleased to announce the following promotions: **Kaylene Lahn** to Senior Vice President, Corporate Secretary and Internal Control Officer; **Diana Grantham** to Assistant Vice President and Business Services Manager; **Christy Patterson** to Corporate Services Officer and **Amber Jensen** to Human Resources Officer.



Kaylene Lahn



Diana Grantham



Christy Patterson



Amber Jensen

## Do Your Own Taxes— For FREE

See how easy preparing taxes can be. Try TurboTax® Online<sup>SM</sup> Free Edition today. As a valued Heritage Bank customer, you're invited to use TurboTax® Online<sup>SM</sup> Free Edition—the #1-rated, best-selling tax preparation products year after year. Do your federal tax return for FREE today with TurboTax Online. For more information visit our website, [www.HeritageBankWA.com](http://www.HeritageBankWA.com) and follow the TurboTax links.



## Growing with the Neighborhood

### Stadium Thriftway

No doubt about it, Mike Hargreaves is a smart business owner; his store, Tacoma's Stadium Thriftway, is a thriving neighborhood grocery. Much of its success, though, is due to decisions Mike made with his heart—not his head.

Like other grocers, Mike has responded to consumers' demands for organic produce and natural meats. He's expanded his deli offerings to satisfy a hungry lunch crowd and his store offers more ready-to-cook entrees than ever before—all sound business moves.

He also owns and staffs a shuttle van that transports around 100 shoppers each week to and from his store. "The van service is free and it's certainly not a moneymaker, but we do it because it's the right thing to do," he says. "Our van allows people their independence. They come here and get their groceries and go down the street to get their prescriptions and dry cleaning. It's the sort of thing I don't want to run a spread sheet on because it makes more sense emotionally than it does financially."

Neighboring businesses also benefit from Mike's heart-driven decisions. He routinely offers up his security staff's services to escort their employees to their cars after dark.

"We try hard to take care of the neighborhood that takes care of us," he says—and it's more than just talk.

Mike recently finished a decade of service as president of his local business district and is proud of improved signage, streetscape and newly established events including a Wine Walk and Dickens Festival. He's now serving as chairman of the board of Emergency Food Network, an organization that distributes food to Pierce County's food banks, hot meal sites and shelters.



*Pictured left to right: Mike Hanberg, Business Banker, with Mike Hargreaves, Stadium Thriftway.*

"As a business, we get about 20 solicitations for donations every week. By focusing our giving on two main causes— feeding people and neighborhood schools — we feel like we're able to make a bigger difference."

Mike initially was hesitant to follow his dad into the grocery business. "I worked for him in high school but I thought I'd try construction for a while after graduation," he says. "It didn't take long for me to gravitate back to the business." Mike partnered with his dad at Stadium Thriftway in 1986. He and his wife, Jan, bought out his parents' interest in the store in 1998.

"People ask me if I'm going to buy other stores but, for me, this store is plenty," he says. "I'm here every day, these employees and the customers are like family."

Turnover among Stadium's Thriftway's 50-member workforce is low; three employees have tenures of 20 years or more, and half of Mike's employees—including his daughter, Angela—have worked for the store for eight years or longer.

Now, Mike and his staff are excited about a new chapter in Stadium Thriftway's history: an extensive remodel and expansion is scheduled to begin in March.

"There's been phenomenal change in this neighborhood since the mid-'80s. In 1986 it was scary in here sometimes," says Mike. "We've evolved from that. This is a comfortable place and, with all this new space, we're going to be able to even better serve our customers."

And, as Stadium Thriftway grows, Mike knows Heritage Bank will be there every step of the way. "We'd been struggling with another bank when we decided to switch to Heritage about five years ago. I have to say, moving our business there was a great decision," says Mike. "Mike Hanberg is our business banker and he and I talk at least once a month," he says. "He knows our business and I appreciate that he's there to bounce ideas off. Heritage respects us, our time and our business. That makes them a good partner."

Stadium Thriftway is located at 618 N 1st Street in Tacoma.

## Foster Children Holiday

The Tumwater, Lacey and Indian Summer Branches, with help from their customers sponsored five foster children this holiday season for the Department of Child and Family Services. Total cash and gifts donated exceeded \$700. Thanks to all who donated.



Heritage Bank employee, Clark Burkheimer is joined by Don White and Dick Pust from KGY Radio Station and Ralph Munro.

## Salvation Army Bell Ringing

Volunteers from the Thurston County teams participated in bell ringing for the Salvation Army on the corner of 5th and Columbia on December 19, 2008.

## Warm Hands

The Shelton branch, in partnership with Bob Buhl, owner of Allstate Insurance, collected more than 1,500 pairs of gloves and hats for the Warm Hands Campaign. For the last five years, Allstate and Heritage have co-sponsored this campaign with contributions from other local organizations. They collect hats, gloves and scarves for elementary students in the Mason County School District.

## Food Drives

The Lakewood team collected food items and prepared 25 Christmas stockings to donate to the Greater Lakes Mental Health Clinic. They also volunteered for the Clover Park Rotary, assembling and distributing holiday food baskets to 45 families for Thanksgiving and Christmas.

The Thurston County offices collected almost \$400 in cash and more than 700 food items to donate to the Thurston County Food Bank in November.

## Santa Breakfast

The Santa Breakfast is part of Christmas Forest, the annual fundraiser for the Providence St. Peter Hospital Foundation in Olympia. This event benefits the Providence mission to provide basic health services to those in need. Heritage volunteers were there to set-up, decorate tables, check-in attendees and assist with seating and photos with Santa. More than 300 guests attended this year and were entertained by Emmy award winning singer, Tim Noah.

## Fantasy Forest

Heritage Bank employees donated more than 125 hours of volunteer service for Mason General Hospital Foundation's 5-day fundraiser. Events included a fashion show, father-daughter dinner and formal gala auction.



## Fall Ball

The Olympia team enjoyed a formal night at Fall Ball, an auction dinner fundraiser for the Olympia Downtown Association, which raised more than \$54,000. They were responsible for attendee check-in, raffle ticket sales, documenting auction bids, distributing purchased items and payment collection.

## United Way

Thurston County did a remarkable job raising funds for United Way this year. The total campaign brought in more than \$16,000 from Heritage Bank alone through employee contributions, breakfasts, bake sales, raffles and silent auctions. Patty Ritterhouse and Jill Patters handmade and sold more than 150 gift bags for the cause.

### Executive Officers

**Brian L. Vance**  
President and Chief Executive Officer

**Gregory D. Patjens**  
Executive Vice President

**Donald J. Hinson**  
Senior Vice President and  
Chief Financial Officer

## Our Vision

We are an Innovative Team providing Financial Services where Your Success is our Vision

## Our Mission

We are Committed to Continuously Improving: Customer Satisfaction, Employee Empowerment & Shareholder Value

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