GREENLEAF® TRUST

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FOR IMMEDIATE RELEASE

Allison L. Birmingham and Paul R. Jude obtain the Certified Wealth Strategist® industry designation

Kalamazoo, MI – Allison L. Birmingham and Paul R. Jude are among the first 2000 professionals obtaining the wealth management skill set of the future. The Certified Wealth Strategist® designation, administered by Cannon Financial Institute, recognizes those individuals completing thorough study of the issues surrounding effective wealth advising to comprehensively address clients' wealth management needs.

Obtaining the Certified Wealth Strategist® designation provides financial services professionals with the technical knowledge, practice management know-how and the critical client communication skills to create and build a wealth advisory practice that works effectively for clients with more complex wealth issues. These professionals strive to become their clients' trusted advisor.

"The creation of the CWS® designation was in response to a need in the industry for a practical, application-based certification program for financial professionals. Specifically, in volatile times like the present, a respected financial service professional requires the skill set of a "trusted advisor". Defined as an advisor with not only the competencies to understand their clients specific wealth needs but the conversational skills to communicate it in a way that the client comprehends. Completing this designation distinguishes the recipient for their commitment to their clients' financial future," said Phil Buchanan, Chairman, CWS® Advisory Board and CEO, Cannon Financial Institute.

Both Allison and Paul specialize in the development of comprehensive wealth management plans, the execution of goal-based planning strategies, and the management of client investment portfolios. All such services are specifically tailored to each client's unique needs and delivered in a team-based environment.

With offices in Kalamazoo, Birmingham, Traverse City and Petoskey, Greenleaf Trust is an independent Michigan-chartered trust-only bank, exclusively focused on wealth management, trust and estate administration, and administration of company-sponsored retirement plans. Through our unique, client-centric team approach, we provide highly personal and customized client service, with no conflicts of interest, to ensure our clients' financial security from generation to generation.

About Greenleaf Trust

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