



*Michael F. Odar, CFA
President*

“If my teenager ever wants my advice on how to run a business, here are a few of my nuggets.”

Seven Truths Over 15 Years

This month I am celebrating my 15th year with Greenleaf Trust. For me, it's both hard to believe and very gratifying. Where did the time go? Looking back, a lot has happened both personally and professionally for me over that time. I now have a teenager whose shoe size is bigger than mine and professionally have taken on a few more responsibilities since moving from a Junior Research Analyst when I started to the President of our unique organization.

As I take time to reflect, I can't help but think of all the lessons I have learned and how they get woven into the fabric of the organization. The lessons become beliefs, good things happen, and then they are simply how you do what you do. If my teenager ever wants my advice on how to run a business, here are a few of my nuggets.

Relationships Matter

We are in the relationship business and deeply value our relationships with clients. If we don't take the time to really get to know our clients and have them really know us, we won't be able to do the impactful work for them that we aspire to. Relationships are also built with hard work and lots of communication.

People Matter

The people that make up our team (I like to call them Greenleafians) are our greatest asset. It's a primary responsibility of our leadership team to make sure our team is engaged and inspired. The result will be exceeding the wants, needs, and desires of our clients.

Culture Means Everything

You can hire all the talented people you want, however if you don't provide the right culture for them to thrive they won't stick around long. A vibrant culture multiplies the impact of those you bring into it.

Clients Should Always Come First

We are in business for our clients and because of our clients. Our hierarchy has always been clients first, employees second, and shareholders third. Our clients are not getting our best if they are not first.

Don't Ever Stop Learning

Institutional hubris has been the demise of many organizations. And if you stop looking for opportunities to learn because you think you know it all, you will stagnate and the world will pass you by. Continuous improvement involves learning every day.

Seven Truths, continued

Trust is Something You Earn

We go to work every day on behalf of our clients, and take that responsibility very seriously. Trust starts with a relationship and is earned over time through experiences involving reliable, good, honest, and effective work.

Teamwork is Not Just a Word

It's a powerful multiplier. It's a relationship built on trust, commitment, candor, accountability, and attention to results. Our team started 15 years ago at 10 members and now stands 90 strong. Our growth is because of teamwork and we rely on each other because our clients rely on us. 