



## 2019 Strategic Initiatives

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In October, our Executive Leadership Team (ELT) emerged from our 2018 Advance in Birmingham, Michigan with a unified and comprehensive strategic plan for 2019. Our Advance is held off-site each year at a location that removes the team from distractions and focuses everyone's attention on candor and the best way forward. Our long-term goal continues to be top of mind to those we serve with sophisticated needs. Our plan contains annual strategic initiatives that serve to focus our efforts and guide our decision making. In 2019, our Strategic Initiatives again reflect our unwavering desire to provide top of mind holistic wealth management and fiduciary services for our clients into perpetuity through scalability, sustainability, and sophistication. For 2019, our Strategic Initiatives are Workplace Culture, Strengthen the Core, Purposeful Growth, and Set the Stage.

### Culture

In our annual corporate Strategic Planning Questionnaire, our clients and our culture are consistently what our teammates rank as most important to them. We consider our culture to be the behaviors and beliefs that are alive within our workplace environment. We work hard to develop and strengthen our culture every day for good reason. With a vibrant culture focused on talent development, inter-office connectivity, the client experience, communities and diversity, we have a high performance work environment that engages and inspires our team to do great work for our clients.

### Strengthen the Core

We recognize that what got us to this point in our 20-year

history will not necessarily get us to where we want to go in the next 20 years. Our processes and procedures need to continue to evolve and be scalable. We continue to look for ways to work more efficiently and effectively to improve the client experience. Workflow software, digital marketing, data warehouse improvements, [mywealth](#), and enhanced trading capabilities will help us do this. Additional investments in technology, systems, and people will enhance capabilities and help us do more for clients at a higher level.

### Purposeful Growth

Growth for the sake of growth is a fool's game. Our growth strategy involves growing deeper and broader in our capabilities in order to serve existing and prospective clients better. If we do that successfully, we will be able to serve more clients. In 2019, we are again purposely taking actions to continue to grow our presence and talent in all the markets we serve. We have also engaged a public relations firm to help us increase awareness across the state of Michigan of all that makes Greenleaf Trust unique.

### Setting the Stage

In addition to strengthening our existing service model, we continue to look for ways to serve more and better. And, sometimes differently. The opening of Greenleaf Trust of Delaware and the growth of our Family Office division are great examples. In 2019, we are exploring growth of services related to directed trusts, emerging wealth clients, Family Office clients, and Institutional clients. Potential acquisition due diligence and geographic expansion research will also be a part of setting the stage for the future. 