



Traverse City Growth

*Michael F. Odar, CFA
President*

As I wrote last month, our belief in and commitment to the communities in which we live and work is part of what makes our culture and firm uniquely different. So naturally we are extremely excited about our new future home in Traverse City at the corner of Cass and State streets that is necessary to accommodate our growth in the area.

Beginning the summer of 2020, our new home in Traverse City will be on the second floor of the Old City Hall, which is currently undergoing a complete historic renovation. The building originally built in 1904 served as Traverse City's post office for many years before it was sold to the city in 1939, at which point a second story was added and it became City Hall. We are honored to be a part of restoring a piece of the community's history through the renovation of the building alongside expert partners Catalyst Development, TowerPinkster, and the CSM Group. We were able to share that feeling and the support from the community with local friends and clients at a special Hard Hat Tour party on May 9.

Our commitment to the Traverse City community began over 10 years ago when John Welch joined our company as a Business Development Officer. A long-time resident of northern Michigan and a leader in the trust and financial services industry, John had a clear vision of the alignment between his community and the unique culture and service model of Greenleaf Trust. And, he was right. Today, John serves as

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Greenleaf Trust's Northern Michigan Managing Director and oversees a growing market that now includes 145 client relationships and more than \$570 million in assets under advisement. In order to serve this

growing market our team in northern Michigan has needed to expand as well. The team's expansion has not just been in number but also in diversity of experiences, talents, and knowledge. Today's Northern Michigan team includes:

- George Bearup, J.D. – Senior Trust Advisor
- Regina Jaeger, CTFA – Vice President, Senior Trust Relationship Officer
- Lauree VanderVeen, CTFA – Vice President, Senior Trust Relationship Officer
- Brad LaTour – Senior Trust Relationship Officer
- Jennifer Dohm – Team Service Coordinator II
- Sharon Sleeper – Team Service Coordinator II
- Corbin Donaldson – Wealth Management Advisor

And, together with John the team has more than 200 years of experience in comprehensive wealth planning, trust administration, estate settlement, and fiduciary oversight. We are excited about the future of Greenleaf Trust in northern Michigan and look forward to seeing everyone at our new home in summer 2020. ☑

