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## Wendy and mostly sunny.

Wendy Cox could have cried. It would have been unusual to do so at such a happy moment, smack in the middle of her job interview. But there she was, listening to a top Greenleaf Trust executive articulating the core values of his company. There were no catchphrases, and no business book themes du jour. Just a clear premise spoken with conviction: “Do what’s right, honest and honorable, and always put the clients’ interests first.”

It was exhilarating and it was a first. Over the previous two decades, Wendy had been VP, director of private sales for a major bank, where she’d overseen a team of wealth management advisors; she’d practiced law in probate and trust litigation and administration; she was securities-licensed, holding the Series 7, 66 and 24; and she’d earned BA and JD law degrees from the University of Michigan. But now, for the first time in her professional life, she was hearing what she had long wanted to hear. Not as an aside, but purposefully from William D. Johnston, Chairman of Greenleaf Trust.

That same month in 2012, Wendy Cox joined Greenleaf Trust’s client centric team as a Trust Relationship Officer. From our Birmingham office, Wendy advises clients on trust- and estate-related matters, and oversees day-to-day account and fiduciary requirements. As an integral part of a goals-based wealth management firm with billions in assets, unwavering focus on integrity and trust and nearly 100% client satisfaction rates, she’s now in a position to significantly improve your well being. To learn more about how we can help you achieve financial security from generation to generation, call us. Your own tears of joy may flow.



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