

Say hello to Jeannine Stetson, and you'll never want to say goodbye.

You may have noticed that Naples has a slew of banks and financial firms, nearly all of whom tout their wealth management capabilities. Turning aspirations and financial dreams into reality, it seems, is simply a matter of having the right products and funds. And while there is some measure of truth to that, successful generational wealth management is also, in no small part, “human nature” management. In other words, ensuring that wealth endures in accordance with your values and wishes and over the course of your life, and for generations to come. That’s important, because wealth can be a fickle friend. All the more reason, then, to work with a trusted advisor whose empathy can elevate its blessings and alleviate its burdens.

Greenleaf Trust, therefore, is pleased to announce that trust relationship officer, Jeannine Stetson, has joined our recently opened Naples office. An educator at heart and servant leader by example, Jeannine’s sole focus is on our clients’ best interests. It’s a welcome change from the large financial firms where she previously worked, whose cultures tended toward the transactional side of things. Jeannine’s passion, refreshingly, is in the relational side, where understanding and meeting a client’s every need is paramount.

With Greenleaf Trust’s ethos of being honest and honorable, our privately held ownership, our 99% client retention, our Midwest values, and our holistic wealth management approach, we’ll be at your side through thick and thin, from one generation to the next.

It all starts with a conversation. Say hello to Jeannine.



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