Brian Balke, CFP®

Portfolio Manager

Brian serves as portfolio manager on client relationships and is responsible for implementing the Legacy Trust investment strategy. He is a member of the Legacy Trust Investment Team and is responsible for third party manager research and monitoring, as well as, providing analysis on current economic and market data. Brian also manages client relationships directly and leads portfolio reviews. Drawing on his portfolio management and wealth planning experience, Brian helps create comprehensive financial plans for our clients to support the realization of their unique goals.

Experience

Legacy Trust, 2012 - present
Speedway LLC, 2012
Centennial Country Club, 2007 – 2011

Certification

Certified Financial Planner®

Education

B.S., University of Dayton (Ohio)

Community Involvement

D.A. Blodgett – St. John's – Emerging Leaders Council, Chairman

BISSELL Pet Foundation – Junior Board Member

Legacy Trust Award Collection - Committee Member

Economic Club of Grand Rapids - Member

West Michigan Estate Planning Council - Member