

Jeremy Barber, MBA



Assistant Vice President, Portfolio Manager

In his role as a Portfolio Manager at Legacy Trust, Jeremy is responsible for discovering and recommending client specific investment solutions for each one of his clients. As a member of the Portfolio Management team, Jeremy is responsible for the research and analytics which comprises the risk analysis of the portfolio construction process. As a Portfolio Manager who seeks a more profound understanding of his clients goals and aspirations, Jeremy is researching and writing his dissertational thesis on the: *“Intergenerational Cognitive Dissonance in Investment Decisions and Transfer of Wealth.”* With that focus, he has worked on portfolio management solutions with high new-worth clients and corporations in the West Michigan Community for the past 8 years.

Experience

Legacy Trust, 2018 – Present
Fifth Third Private Bank, 2011 – 2018
UBS, 2010 – 2011
Superior Capital Mgt., Stony Point Fund L.P., 2008 - 2009

Education

Ph.D. Candidate, Northcentral University –
Specialization in Finance
MBA, Davenport University – Specialization in
Finance
B.A. Davenport University - Finance

Community Involvement

Co-Director of Private Foundation
Co-Founded the Boys and Girls Club Youth
Commonwealth of Grand Rapids’ Music Makers
Program
Assistant Coach for annual Western MI U-14 AAA
Tournament Hockey Team
Teaches summer learn to skate programs for inner-
city children and other youth hockey players

