

# Laina Mills, CFA, CFP®



## Senior Vice President, Chief Investment Officer

In her role at Legacy Trust, Laina leads the development, execution and oversight of the company's investment philosophy and asset management strategies, including asset allocation guidelines, tactical positioning, portfolio construction, and investment policy design. She also manages key individual and family office portfolios directly, working alongside the firm's wealth management staff to deliver investment solutions that are customized to meet client needs.

## Experience

Legacy Trust, 2009 – Present  
Summit Investment Guidance Partners, 2005 – 2009  
UBS, 2004 – 2005

## Certification

Chartered Financial Analyst  
Certified Financial Planner®

## Education

B.A., Rollins College

## Community Involvement

Frederik Meijer Gardens & Sculpture Park –  
Board Member  
Opera Grand Rapids – Board Member  
Catholic Charities West Michigan – Board Member  
St. Cecilia Music Center – Investment  
Committee Member  
Economic Club of Grand Rapids – Member  
Association for Corporate Growth WM – Member  
Women Investment Professionals of  
Chicago – Member

