

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 comprise 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 net worth clients and corporations in the West Michigan Community for the past nine years.

Experience

Legacy Trust, 2018 – Present
 Fifth Third Private Bank, 2011 – 2018
 UBS, 2010 – 2011
 Superior Capital Mgt., Stoney 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
 Programs
 Assistant Coach for annual Western MI U-14 AAA
 Tournament Hockey Team
 Teach summer learn to skate programs for inner-city
 children and other youth hockey players
 Grace's Table Volunteer
 Hope Network Volunteer

