

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
Downtown Market Grand Rapids – Board Member
Opera Grand Rapids – Board Member
Catholic Charities West Michigan – Board Member
St. Cecilia Music Center – Investment
Committee Member
Association for Corporate Growth WM – Member
Women Investment Professionals of
Chicago – Member

