Brian Balke, CFP®, CIMA®

Assistant Vice President, Wealth Advisor

Brian serves as primary relationship manager, working with clients on the execution of their comprehensive wealth plan, ensuring their personal objectives are being achieved and goals are within reach. Brian collaborates with other members of the Legacy Trust team to expand our business within defined target markets.

Brian also continues to serve as lead portfolio manager over client accounts, including many of the company's key relationships. Brian is a member of the Legacy Trust Investment Team and is responsible for implementing the Legacy Trust strategy.

Experience

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

Certification

Certified Financial Planner™
Certified Investment Management Analyst®

Education

B.S., University of Dayton (Ohio)

Community Involvement

D.A. Blodgett St. John's – Emerging Leaders Council, Past Chairman
BISSELL Pet Foundation – Junior Board Member
Economic Club of Grand Rapids – Member
West Michigan Estate Planning Council – Member