Brian Moore, MBA, CFP®, CTFA

Senior Vice President, Senior Wealth Advisor

As a Senior Wealth Advisor, Brian focuses primarily on relationship management and delivering comprehensive wealth planning services to executive and high net worth clients. He brings significant expertise in sophisticated wealth management strategies focused on creating tax efficiency for the accumulation, preservation and transition of family financial resources. Prior to joining Legacy Trust in 2003, Brian spent many years providing wealth planning and trust administration at Old Kent Bank, later Fifth Third Bank. Brian left Legacy Trust in 2016 to manage wealth management teams in other cities, but soon found himself missing West Michigan and the freedom to focus on the holistic process of helping people find solutions to their most difficult financial concerns. He is happy to be home again in Grand Rapids and at Legacy Trust.

Experience

Legacy Trust, 2019 – present
West Shore Bank, 2016-2019
Legacy Trust, 2003 – 2016
Old Kent / Fifth Third 1998-2003

Certification

Certified Financial Planner™
Certified Trust and Financial Advisor
Licensed life and health insurance agent

Education

B.S., Michigan State University
MBA, Western Michigan University

Community Involvement

Ronald McDonald House – Past Board President
Kentwood Aquatics Club – Past President and Treasurer
St. Mary Magdalen – Volunteer
Rotary Club - Member
Economic Club of Grand Rapids – Member
West Michigan Estate Planning Council – Member