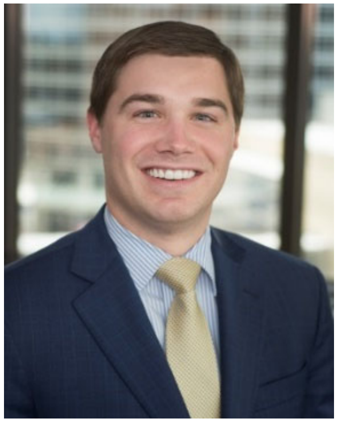
Brian Balke, CFP®, CIMA®



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

Certification

Certified Financial Planner
Certified Investment Management Analyst®

Education

B.S., University of Dayton (Ohio)

Community Involvement

West Michigan Planned Giving Group – Board Member
Herat of West Michigan United Way – Finance Committee Member
Economic Club of Grand Rapids – Member