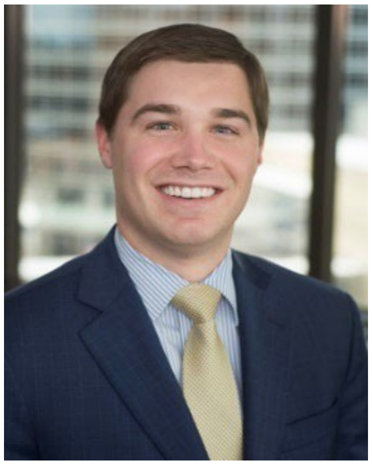
Brian M. Balke, CFP®, CIMA®



Vice President, Senior Portfolio Manager & Wealth Advisor

Brian is serving as portfolio manager over many of the company's most significant relationships. Brian is also a key member of the Legacy Trust Investment Team and is responsible for crafting and implementing the Legacy Trust investment strategy.

Brian continues to serve as lead 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 also collaborates with other members of the Legacy Trust team to expand our business within defined target markets.

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
Heart of West Michigan United Way – Finance Committee Member
Economic Club of Grand Rapids – Member