



News Release

## **FIDUCIARY PARTNERS ANNOUNCES RECORD-SETTING YEAR, STAFF UPDATES**

Appleton, Wisconsin (January 8, 2018) – Fiduciary Partners Trust Company, the only independent and privately owned trust company of its kind in the state of Wisconsin, today announced 2017 was another record-setting year, continuing a trend that has led the firm to achieve more than \$1.25 billion in assets under administration. Total revenue more than doubled and net earnings more than tripled over the most recent five-year period, and new business generated in 2017 also set a record for the company.

In addition to record financial results, the firm also announced the following:

Ryan Valentine, Vice President, Shareholder and Chief Financial Officer, recently earned his Master of Business Administration (MBA) degree from the University of Wisconsin – Oshkosh. “For me, one of the benefits of the MBA is the in-depth exposure to a wide array of business management situations, strategies and practices. As Fiduciary Partners’ growth continues this will strengthen our ability to help our employees, clients and business partners”, Valentine said.

Donna Roccia has been promoted to the position of Marketing Coordinator, reporting to Vice President Alan Blake. As Marketing Coordinator, Roccia will be responsible for the firm’s website and social media presence, marketing presentations, provide support for the firm’s business development efforts, and serve as a liaison to outside marketing firms.

Tori Jambretz has been promoted to Trust Administration Specialist, assisting Melissa Mislinski and Brennan Haworth; Nicole Wachter has joined the firm as Office Administrative Specialist/Receptionist (Appleton); and Kristi Bartel has joined the firm as a Trust Administration Specialist in the firm’s funeral trust division.

Fiduciary Partners Trust Company provides trust services to individuals, families and charities. Founded in 2001 with offices in Appleton and Brookfield, Wisconsin, it is a privately owned independent trust company with assets under administration of more than \$1 billion. For more information about Fiduciary Partners Trust Company, visit the company’s website at [www.fiduciarypartners.com](http://www.fiduciarypartners.com).

---

Contact: Pete Rogers at 920-380-9960 or call 866-380-9969 toll free.

### **FIDUCIARY PARTNERS TRUST COMPANY**

3913 W PROSPECT AVE STE 201 • APPLETON WI 54914-8797 • [www.fiduciarypartners.com](http://www.fiduciarypartners.com)  
TELEPHONE: 920.380.9960 • TOLL FREE: 866.380.9969 • FAX: 920.380.9961