



34

EMPLOYEES

OVER  
\$1.25B

ASSETS UNDER  
ADMINISTRATION

2

LOCATIONS

## Fiduciary Partners Trust Company

Since our founding in 2001, Fiduciary Partners Trust Company has grown from two employees to 34, established office locations in Appleton and Milwaukee, achieved assets under administration of over \$1.25 billion and has built working relationships with more than 1,000 centers of influence.

As we celebrate these milestones and look forward to the next chapter, we reflect on what remains steady and unchanging: being independent and privately owned, mostly by employees, and our belief that trust services are meant to be delivered locally and are best when they are personal, flexible and provided with compassion. We do not manage money, believing that collaborating, rather than competing, with our clients' advisors results in better service.

We have embraced planning for the future of Fiduciary Partners and how we maintain our unwavering commitment to providing independent trust services and partnering with our centers of influence and those we serve. We are excited to announce upcoming transitions to our management team.

### OWNERSHIP AND GROWTH UPDATE

In early 2019 new employee shareholders will be announced, bringing the total number of shareholders to ten, seven of which are staff members. Additional expertise has been added with a Risk and Compliance Manager and a Business Manager joining the firm. Staff members and trust officers have been added to both our Appleton and Milwaukee locations.

These changes reflect the record setting growth of the firm and careful planning to position Fiduciary Partners for continued success and providing the compassionate, responsive and personalized service we are known for.

# ROGERS TO RETIRE

After a 35 year career, co-founder and President Pete Rogers will retire at the end of 2018. Pete has served as President since the firm's inception in 2001. Pete and his wife, Sheree, are relocating to Florida to pursue their favorite hobby, sailing, on a more full-time basis. Pete will remain a shareholder in the firm.



## Valentine to step in as new President

With Pete's planned retirement, Ryan Valentine will be promoted to the role of President on January 1, 2019, with responsibility for the firm's overall management and direction. Ryan joined Fiduciary Partners in 2008 and has over 16 years of trust administration and management experience and holds an MBA from the University of Wisconsin Oshkosh. Ryan has worked closely with Pete since joining the firm, was named CFO in 2017 and became a Shareholder in 2015.



## Gamble as new Chairman

Dick Gamble, Vice President and Shareholder, will become Chairman of the Board of Directors and will continue to be a member of the senior management team. Trained as an attorney, Dick has more than 30 years of experience in estate planning, estate and trust settlement, and trust administration. He joined Fiduciary Partners in 2007 as the firm's fifth staff member and has been integral to the firm's growth.



### J. ROBERT ELLIS

Bob Ellis, Vice President and member of the senior management team, will assume responsibility for the overall development and delivery of trust administration services, including estate and trust settlement. Bob's more than 22 years of experience and legal education make him uniquely qualified to lead trust administration services for the firm and to continue the same responsive and personalized service Fiduciary Partners is known for.



### MICHAEL SESSA

Mike Sessa joined our team in the Milwaukee location in May 2018 as Vice President and Market Manager. In addition, Mike is a member of the senior management team. His legal background and 20 years of experience in trust administration services provides strong leadership to continue the firm's service and growth in the Southern Wisconsin and Northern Illinois markets.

We are grateful for the confidence and trust you place in Fiduciary Partners, and we invite you to call or visit our website with questions or for further information.