Arbor Trust Wealth Advisors Celebrate Fifth Anniversary

The Firm's dedication to Go Beyond Advice
Attracts New Clients

ANN ARBOR, MICHIGAN, USA, August 29, 2019 /EINPresswire.com/ -- When financial advisors Gary Haapala, Carol Sewell, Charles Waterhouse and James Winslow formed Arbor Trust Wealth Advisors in August 2014, their clients were first and foremost in their minds. The four partners left a local community bank to form a registered investment advisory firm with the goal of being THE trusted wealth advisor for each of their clients.

Now celebrating its fifth anniversary, Arbor Trust has lived up to its motto, "Beyond Advice." The firm has grown to $330 million in assets under management. Arbor Trust provides its clients with an integrated approach to wealth management that seamlessly encompasses financial planning, trust and estate planning and administration, investment strategies, risk and liability mitigation, tax strategies, philanthropic endeavors, and more.

"Five years ago, we started the next chapter of serving our clients by launching an independent business with four partners," says Gary Haapala, Managing Partner and Senior Financial Advisor. "We have experienced incredible growth and look forward to serving our clients for generations. The support we have from our clients, family, friends and the professional community is overwhelming."

Arbor Trust's growth reflects its ongoing dedication to client service. The firm serves the financial and wealth management needs of families and couples, professionals, entrepreneurs and business owners. In addition to the original four partners, the team has expanded to include Senior Client Service Associate Kristi Harvey, Senior Financial Planner Joan Hoeft, Operations Manager Laura Yarckow, Client Service Associate Jennifer Fowler, and Financial Planner Philip Tribble.

The firm's partners and professionals strive to exceed client expectations by going beyond simply providing advice. "Our passion is in developing deep relationships with our clients, understanding their goals and dreams, and creating a plan to give them peace of mind," says James Winslow, CFP™, Partner and Senior Financial Advisor.

Partner and Senior Financial Advisor Charles Waterhouse agrees. "Our motto, "Beyond Advice," means we do what's right for our clients. It's our unique approach to serving our clients. We know that you can't be a leader if you are following everyone else. Our growth and success over the past five years – we couldn't have done this without our clients."

Involvement in the Ann Arbor community has been a hallmark of Arbor Trust since the firm's inception. Partner and Senior Financial Advisor Carol Sewell notes, "We are proud to be part of our community and serve as the trusted advisor to so many families, couples, professionals and business owners. Our connection with our clients is both personal and professional – it reflects our deep commitment to making our clients' hopes and dreams a reality."

For more information on Arbor Trust Wealth Advisors and the wealth management services it provides, contact the firm at:

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