BRIDGES | TRUST
8401 West Dodge Road
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QUARTERLY NEWSLETTER

THINK FORWARD

Please contact us if you'd like more information about how Bridges Trust can help you meet your long-term financial objectives.

(402) 393-8300 | contact@bridgestrust.com

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OCTOBER 2017

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THINK FORWARD

CONTENTS

Welcome to the Bridges Trust Quarterly Newsletter – Think Forward. Our goal is that this newsletter will be a useful tool to keep in touch with you.

If you would like to receive this newsletter by email, please send us a message at **contact@bridgestrust.com** or sign up on our website.

Thanks and happy reading!

MEET OUR NEW TEAM MEMBERS

BY BRIAN R. MILES

We are pleased to announce Michael G. App, Megan M. McMurry and John J. Clatanoff as new additions to our team.

Michael G. App ("Mike") joins the firm as Executive Vice President where he will serve as a senior member of the firm's management team and will oversee overall operations. Mike comes to Bridges Trust with extensive experience in family office services and investment management of both publicly traded and private equity portfolios. A veteran of the banking and investment industries, Mike finds fulfillment helping families and foundations create, safeguard and position wealth to accomplish their specific goals. Mike will primarily be responsible for family office services, investment management operations, wealth creation and preservation services, and new business development.

Mike earned a BSBA in Finance from Creighton University and is active in the Omaha community, investing his time and talents in several public and private boards and organizations, including, but not limited to, American National Bank, Hawkins Construction, Creighton Prep High School Investment Committee, Maha Music Festival and St. Pius / St. Leo X School.

When Mike is not in the office or spending time with clients, he enjoys eating ice cream at his wife's shop, eCreamery, in the Dundee neighborhood of Omaha, traveling and eating out with his wife and friends, trying to keep up with his two young sons, fly fishing and playing tennis.

Megan M. McMurry ("Megan") joins the firm as Vice President of Client Services. In that role, Megan will be responsible for collaborating with clients to help them identify and achieve their wealth management objectives through highly personalized service and advice. As a Certified Public Accountant (CPA) and Certified Financial Planner® (CFP) Megan brings valuable experience and insight in

Continued on next page

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tax, estate, multigenerational, philanthropic and insurance planning that will increase both the depth and breadth of expertise that the firm provides to its clients.

Megan earned a BS in Accounting and Business Administration from Concordia University and a MS in Accounting – Taxation Option from the University of New Orleans. After almost a decade in public accounting Megan decided she wanted to impact clients in a different way. She spent the next three years refining her financial planning skills at a brokerage firm where she was the regional and team specialist in financial planning. Megan is excited to share her planning knowledge and experience with clients of Bridges Trust.

Megan is active in the community, serving on Blair Community Schools Foundation, Accounting & Financial Women's Alliance, Omaha Estate Planning Council, Future Business Leaders of America, First Christian Church and the Basset and Beagle Rescue of the Heartland. Away from her responsibilities at Bridges Trust, Megan likes to be on the go! Chasing after her daughter, fishing with her husband, taking their dogs to the dog park, vacationing with their extended family and experimenting with her garden are on her top five list of things to do.

John J. Clatanoff ("John") joins the firm as Vice President of Administration. In that role, John will be responsible for general corporate accounting processes, financial reporting, budgeting and forecasting, as well as other administrative functions, including information technology, human resources, benefits and payroll.

John earned a BS in Business Administration, with a major in Accounting from Creighton University and a MS in Business Administration from the University of Nebraska Omaha.

Giving back to the community is an important part of John's life outside of his responsibilities at Bridges. John is an active member of St. Wenceslaus Parish where he is a lector and soccer coach. He also volunteers for the Harrison Street Church Food Pantry and Habitat for Humanity. In his free time, John enjoys spending time with his family. John is married to Taryn, and they have two active girls, Gabby who is 10 and Aubrey who is 5. John stays busy with their activities at St. Wenceslaus School, where they both attend. He also enjoys spending time with friends, playing golf, traveling and watching pro football.

The hiring of Mike, Megan and John is part of the ongoing commitment of our firm to expand our service capabilities, leverage investment expertise and continue our pattern of growth while maintaining an unyielding focus on earning and maintaining the trust of our clients through excellent investment management, exceptional client service and the development of long-term relationships.

Mike, Megan and John will play a key role in helping the firm build out a comprehensive trust, family office and wealth management solution for our growing client base of successful individuals and families, endowments and foundations, business owners, entrepreneurs and corporations.

Please join me in welcoming Mike, Megan and John to the Bridges Trust team!

MARKET SAVVY AND SOCIAL, TOO.

Be sure to like us on Facebook and follow us on LinkedIn to stay up to date on key economic news.

BRIAN R. MILES PRESENTS AT SCHOOLS OF BANKING

In August, Brian R. Miles, Senior Vice President, was invited to lecture at the Schools of Banking, a joint effort of the Nebraska Bankers Association and the Kansas Bankers Association. This year's school, held in Manhattan, KS, was catered to advanced trust officers, portfolio managers and other wealth management professionals and featured attendees from banks and wealth management firms across five states. Brian's presentations focused on three unique aspects of the wealth management field: 1) Compliance and Ethics, 2) Advanced Estate Planning Techniques and 3) Special Needs Trust Planning.

BRIDGES CONGRATULATES FIVE EMPLOYEES ON CAREER ACCOMPLISHMENTS

BY TED BRIDGES

On Tuesday, October 10, 2017, the Bridges team gathered to recognize the contributions of five long-time employees of the Bridges companies. As of September 30, 2017, Mary Ann Mason (36 years of service), Kathleen J. Stranik (31 years of service), LaVerne L. Kelsay (21 years of service), H. James ("Jim") Cunningham (17 years of service) and Joyce Toelle (10 years of service) officially retired from the firm.

I speak on behalf of the entire Bridges team when I say that we will certainly miss the talents and dedication that Mary Ann, Kathleen, LaVerne, Jim and Joyce brought to our firm each and every day. We would not be where we are as a firm without their outstanding efforts and accomplishments.

Please join us in congratulating Mary Ann, Kathleen, LaVerne, Jim and Joyce on their remarkable contributions to our firm. We wish you all the best!