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Tri-Star Trust Announces the Promotions for Kyle Chapple, Shelby Miller-DuFort, and William Zank.

Gene Pickelman, President and CEO, shares, “Promoting talent from within is one of the most rewarding parts of running an organization. We’re grateful for the dedication Kyle, Shelby, and William give to each other and our clients. Tri-Star is growing, and developing leaders from within is a key to our continued success.”



Kyle Chapple, Investment Manager

Kyle joined Tri-Star in 2014. He began his tenure as an Investment Assistant and has been promoted to Investment Manager. In Kyle’s new role, he will be more client-facing and playing a more active role in the whole client experience. Currently, Kyle is a member of the Saginaw YPN and a past member of their Steering Committee. He won the YPN Rising Star award in 2022.

“I’m most looking forward to meeting with clients and continuing to help them achieve their financial goals,” Kyle commented.



Shelby Miller-DuFort, Retirement Plans Associate

Shelby has been with Tri-Star since 2020 and has taken over the role of Retirement Plans Associate. She currently works with over 5,000 participants on a multitude of matters regarding their retirement accounts. Shelby enjoys working at Tri-Star not only because of her coworkers, but because of the clients she serves. She is currently studying for the QKA exam and is looking forward to continued growth and learning opportunities within her role.

“Her expertise in Retirement Plans and client-centric nature makes her a great fit for the Retirement Plans Team. She fields requests from thousands of plan participants and prides herself on answering all their questions in totality,” says Jane Hagen, Director of Retirement Plans.



William Zank, Investment Manager

Will joined the Tri-Star Team in 2017 as an Investment Assistant. In his last role, Will was splitting time between leading best practices within investment research and performance measurement with the investment managers. He will now be taking on the role of Investment Manager, having a more active role within the client experience. This includes meeting with more individuals, endowments, and foundations and helping each client meet their investment goals. Will is currently the President of the Great Lakes Bay Economic Club. He is a Certified Fixed Income Practitioner and a graduate of a local Dale Carnegie training course on effective



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communications and human relations. Will also hosts Tri-Star's podcast, "Mitten Money."

Congratulations on your promotions, Kyle, Shelby and Will!

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With offices in Saginaw, Frankenmuth, Lansing, and Midland, Tri-Star Trust is an independent Michigan-chartered trust bank. Tri-Star's relationship-focused, community-driven wealth management firm offers financial planning, investment management, trust administration, corporate retirement planning, and philanthropic solutions. The team educates and guides individuals, businesses, and non-profits down a path of achieving their financial goals. Clients achieve their financial goals through personalized wealth management solutions from caring, local, objective experts. www.tristartrust.com