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Tri-Star Trust Announces Promotions for Kyle Chapple, Spencer Hardy, Colby Moergeli, Dane Senkowski, Joel Spickerman, and William Zank.

Tri-Star Trust, a leading wealth management partner, is thrilled to announce multiple promotions of several key employees in the wake of continued growth and success.

“We are delighted to recognize the outstanding contributions of Kyle, Spencer, Colby, Dane, Joel, and William with their well-deserved promotions,” says Pavel Konecny, President, and CEO. “Their unwavering commitment and objective approach have been instrumental in helping our clients achieve their financial goals. They are all very caring, highly-competent team members. The team and I are confident that they will continue to excel in their new roles, contributing significantly to our client, community, and each other’s success. Again, congratulations!”



Kyle Chapple has been promoted to Trust Officer. Kyle joined Tri-Star’s investment team in 2014 and will now add his new title to his role of Investment Manager. Not only does he come to Tri-Star with 11 years’ experience in customer service, but with 4 years’ experience in mutual fund operations. Kyle’s wealth of knowledge and hard work have played a considerable role in the evolution of the investment department.



Spencer Hardy has been promoted to Investment Associate. Spencer joined part-time as an intern in 2021 and became full-time on the investment team in 2022. He was previously involved in Field Medical Technician School in the United States Navy. Following his services, Spencer enrolled at Saginaw Valley State University to earn his Bachelor of Business Administration with a major in finance. Spencer has a knack for technological innovation and has enhanced operations within the department.



Colby Moergeli has been promoted to Financial Planning Associate. Colby has been with Tri-Star’s financial planning team since 2022. He graduated with a bachelor’s degree in finance from Saginaw Valley State University and has 2+ years of experience with financial analytics. His expertise in student loans and college planning has made him a valuable resource for clients and colleagues.



Dane Senkowski has been promoted to Investment Associate.

Dane joined Tri-Star in 2022 as a part-time intern, moving to a full-time Investment Assistant in 2023. He graduated from Saginaw Valley State University in 2022 with a Bachelor of Business Administration with a major in finance, juggling his role as Treasurer of the SVSU Finance Club. Dane has demonstrated strong professional competence and willingness to go “above and beyond” for clients.



Joel Spickerman has been promoted to Middle Office Manager.

Joel joined Tri-Star in August 2022 as a Relationship Assistant. His dedication to finding more efficient and effective execution of middle-office operations has inspired many positive changes that reduce steps and improve the client experience.



William Zank has been promoted to Trust Officer. William has been with Tri-Star since 2017 and will add his new title to his current role as Investment Manager. William brings 10+ years of experience in financial planning and investment management. He is a Certified Fixed Income Practitioner (CFIP), and the host of Tri-Star Mitten Money podcast now in its fourth season. He is involved with the Great Lakes Bay Economic Club and enjoys volunteering at Trinity Lutheran Church.

Congratulations on your promotions, Kyle, Spencer, Colby, Dane, Joel, and William!

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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