



PRESS RELEASE

03/11/24 – FOR IMMEDIATE RELEASE

Tri-Star Celebrates 20 Years in Frankenmuth!

Tri-Star Trust's Frankenmuth location celebrates 20 years! The Frankenmuth office was Tri-Star's second location and has happily served its clients and the community since March 2004. Mark your calendar for a 20th-anniversary week-long celebration!

Larry Preston, Tri-Star co-founder and lead driver in choosing Frankenmuth as Tri-Star's second location, commented, "Frankenmuth was a natural choice for two reasons. We felt no one was providing the type of service we could provide and were excited to offer that to this community. Number two, and most importantly, the community supports each other and provides a family atmosphere. We made the right decision, and I'm grateful to Mary Jo and Bobbi for their leadership!"

Mary Jo Krick, Market Director and Relationship Manager, recounted the first Auto Fest Tri-Star supported in 2004. "I remember hosting a party, and it was a little more 'homemade' back then. I went home during my lunch hour and grilled brats to serve at our Client Party! Our guests gathered in our small back room and in our one conference room. It was tight quarters, but I remember the people making it a memorable evening."

Ann Frank, client and dear friend, was also asked to share thoughts. "When Tri-Star came to town, I knew I wanted to work with them. When my husband Jerry passed away, I was capable of handling everything that needed to be done to settle his affairs, but I had such a sense of overwhelm over losing Jerry. Mary Jo and Bobbi took over everything for me. I remember Bobbi sitting right there with me while I called Social Security. Mary Jo helped me get my paperwork in order, and they even went to the attorney's office with me. You can't put a dollar sign on that kind of help. Best of all, Mary Jo and Bobbi have become very dear friends. They both have made me feel like the most important person when I'm around them."

Mary Jo reminisced about her team at Tri-Star. "Bobbi Putman was our first employee in Frankenmuth. I can't believe that was 20 years ago. Bobbi's role within Tri-Star has grown, and she is beloved by her co-workers, clients, and our community. We're lucky to have her on the team. I feel fortunate to have led our growth efforts for nearly 20 years in my hometown."

Jonathon Webb, Director of the Frankenmuth Community Foundation, shared, "Working with the Tri-Star team has been a wonderful experience. I trust them like they are my own family. They have always treated me with the kindness and caring that is typically reserved for family members, a true loving and caring nature, and the honesty that lets me know they will always support and uplift me. Congratulations on 20 years in Frankenmuth, Tri-Star!"

Thank you to our clients, community, and team for helping us reach this momentous milestone of 20 years! In preparing for Mary Jo Krick's impending retirement, we are



PRESS RELEASE

excited to announce that our Frankenmuth Team is growing. Please help us welcome Mason Sarosi, Market Director and Relationship Manager. Mason has nearly 10 years of experience in wealth management, has been with Tri-Star since 2017, has earned a Chartered Financial Analyst (CFA) designation, is an active Rotary participant, and enjoys traveling. He is thrilled to be on the Tri-Star team and looking forward to getting to know you and the rest of our Frankenmuth community.

Celebrate with us by stopping by the Frankenmuth Office March 18 – 22 between 9 am – 4 pm. Mary Jo Krick, Mason Sarosi, Bobbi Putman, April Parker, Molly Bragg, and Kayla McCormic would love to treat you to a complimentary sweet and hear some of your favorite memories shared together over the last 20 years.

####

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