

01/15/2025 – FOR IMMEDIATE RELEASE

Tri-Star Trust Announces Promotions for Trust Officers, Vice Presidents, and Senior Vice Presidents

Tri-Star Trust is proud to announce the promotions of several key team members, a testament to their dedication and the company's ongoing success. At Tri-Star, seniority titles such as Trust Officer, Vice President, or Senior Vice President reflect career progression and leadership, while functional titles highlight each individual's expertise and responsibilities. This dual-structure approach underscores our commitment to recognizing professional growth and specialized skills.

"As we celebrate our 25th year of helping clients achieve their financial goals, we are thrilled to recognize these talented team members for their hard work and contributions," shares CEO Pavel Konecny. "Success is built on dedication and teamwork, and I am proud to work alongside such a loyal, caring, and knowledgeable team. These promotions reflect their meaningful impact on our clients and communities and our core values of caring, harmony, integrity, objective, and enthusiasm. I am excited about the future and what we will accomplish together."

Listed in alphabetical order.



Brent Bismack has been promoted to Trust Officer. Trust Officer, Relationship Manager

Brent joined Tri-Star in 2023, with 23 years of customer service experience and a passion for leadership. Brent's career transformation, commitment to learning, CFP designation, and ability to grow his client portfolio highlight his dedication to Tri-Star. Brent serves as President of the congregation at Zion Evangelical Lutheran and is an Ambassador for the Bay Area Chamber of Commerce.



Dewey Doyle has been promoted to Vice President. VP, Investment Manager

Dewey joined Tri-Star in 2022, bringing 18 years of experience as a Certified Financial Planner™. He is a dedicated learner and team player who excels at building relationships and providing reassurance to clients about their financial futures. Dewey also serves as Vice President of the Parent Teacher Organization at his youngest daughter's school and volunteers for the Catholic Center girls swim team.



**Adam Engel has been promoted to Vice President.
VP, Director of Operations**

Adam has been part of the Operations team since 2017, contributing his 20 years of accounting expertise and 8 years in human resources. Known for his exceptional communication skills and commitment to teamwork, Adam has been a key contributor to the success and efficiency of executing our internal and external clients' requests. He also serves as treasurer and holds various roles at the Second Presbyterian Church and the Presbytery of Lake Huron. He also dedicates time to mentoring through the READ Association of Saginaw County.



**Jonathan Pickelman has been promoted to Senior Vice President.
SVP, Saginaw Market Director & Relationship Manager**

Jon joined Tri-Star in 2014 with over 15 years of financial planning and client relations expertise. As a Certified Financial Planner™, Jon is dedicated to managing clients relationships and financial needs with precision and care. Active in the Saginaw community, he serves on the Saginaw Zoo board and has chaired its millage and capital campaigns. Jon also actively participates and volunteers with the Saginaw Chamber, Underground Railroad, and several other impactful organizations.



**Kevin Scorsone has been promoted to Senior Vice President.
SVP, Midland Market Director & Relationship Manager**

Kevin has been with Tri-Star since 2018, leveraging 24 years of expertise in wealth management and financial planning. As a FINRA-licensed professional with Michigan Life Insurance Licenses, Kevin creates customized financial solutions tailored to his clients' unique goals and needs. He is actively involved in the Midland community through the Downtown Development Authority, Midland Noon Rotary Club, and Kiwassee Kiwanis. A graduate of Leadership Midland, the Great Lakes Bay Regional Leadership Institute, and Leadership Saginaw, Kevin exemplifies the values of service and collaboration.



**Joel Spickerman has been promoted to Trust Officer.
Trust Officer, Client Services Manager**

Joel joined Tri-Star in 2022. Joel is an analytical learner dedicated to overcoming obstacles strategically. With experience in commercial banking and financial asset management, he has been a cornerstone of various company initiatives, always lending a helping hand with unwavering focus and attention to detail. Joel continues to seek ways to improve his community both inside and outside of Tri-Star.



**Jordan Waier has been promoted to Vice President.
VP, Employee Benefits Relationship Manager**

Jordan joined Tri-Star in 2018 bringing over 15 years of experience in accounting. He holds a Certified Financial Planning® Certification and is known for his ability to build genuine relationships through empathy, humor, and understanding. Jordan's passion for staying informed on industry trends ensures he provides exceptional service and innovative solutions to clients. Jordan also volunteers with organizations such as Relay for Life, East Side Soup Kitchen, and The Arc of Midland, demonstrating his dedication to making a positive impact.



**Kristen Wuerfel has been promoted to Senior Vice President.
SVP, Director of Marketing and Communications**

Kristen joined Tri-Star's Marketing team in 2019, bringing 20 years of expertise in marketing and communications. She has been instrumental in enhancing the client experience, strengthening Tri-Star's market presence, and creating impactful events such as the Tri-Star Charitable Foundation's Charity Pro-Am Tournament and Be A Light Celebration. Kristen's commitment to community service is equally impressive. She serves on the board of Child and Family Services of Saginaw and volunteers with the CAN Council, Northwood University's Project 100, and the Midland Area Community Foundation.



**Melanie York has been promoted to Senior Vice President.
SVP, Chief Financial Officer**

Melanie joined Tri-Star in 2003 and has been a cornerstone of the team ever since. A licensed CPA, she holds a Bachelor of Accounting from Brigham Young University and an MBA from Wayne State University. Known for her intellectual curiosity and strong work ethic, Melanie excels at building relationships, streamlining processes, and fostering team cohesion. Outside of her professional role, Melanie enjoys spending quality time with her family, diving into mystery novels, watching detective TV shows, and exploring abandoned areas, reflecting her adventurous spirit and love of discovery.

Congratulations to the newly promoted leaders! Your dedication, expertise and commitment to our clients and communities are the foundation of Tri-Star Trust's continued success. We are proud to celebrate your achievements and look forward to the lasting impact you will make in your new roles.

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PRESS RELEASE

At Tri-Star Trust, we're a fee-only wealth management provider, managing over \$3 billion with a commitment to your unique financial goals. As an independent Michigan-chartered trust bank with offices in Saginaw, Frankenmuth, Lansing, and Midland, we deliver personalized, comprehensive solutions tailored to individuals, families, businesses, non-profits, and foundations.

Our relationship-focused, community-driven wealth management firm offers financial planning, investment management, trust administration, corporate retirement planning, and philanthropic solutions. With a team rich in experience and diverse expertise, we provide clear guidance every step of the way, helping you fulfill your vision with confidence. By educating and guiding our clients—individuals, businesses, and non-profits—we help them achieve their financial goals through caring, local, and objective expertise. Learn more at www.tristartrust.com.