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LEGACY BRIDGE EXPANDS ITS FAMILY OFFICE SERVICES TEAM WITH SENIOR TALENT

Tamara Fleming, CTFA, Joins Growing Multi-Family Office

February 4, 2025—WEST DES MOINES, IOWA—Legacy Bridge Private Family Offices is pleased to announce that Tamara Fleming, CTFA, has joined the firm as Relationship Manager. This most recent addition to the growing multi-family office deepens the already compelling capabilities of its Family Office Services team. Tammy, with a career spanning more than 25 years and who brings a strong fiduciary and planning background to this position, will focus her expertise on managing ultra-high-net-worth client relationships, including delivering a high level of administrative support for families' day-to-day needs.

Legacy Bridge helps wealth creators, wealth inheritors and their families better navigate the complexity in their financial lives so they can have more time to focus on what is most important to them.

"We are thrilled to have found in Tammy that rare blend of deep Trust Officer experience and passion coupled with an unwavering commitment to serving the unique and varied needs of the ultra-high-net-worth family client," said Cindy Eaton, Head of Family Office Services for Legacy Bridge. "I know she will put our clients first in everything she does and consistently deliver an exceptional client experience—a hallmark of our firm."

Tammy holds her Bachelor's Degree in Business Administration and Management from Upper Iowa University. Additionally, she holds the Certified Trust and Fiduciary Advisor (CTFA) designation from Cannon Financial Institute, one of the highest distinctions in wealth management. Prior to joining Legacy Bridge, Tammy served as Senior Vice President and Trust Officer at Community Bank & Trust in Waterloo, Iowa for more than 13 years. Tammy will be reporting directly to Cindy Eaton.

Michael T. Zuendel, Founder and CEO of Legacy Bridge, said, "We appreciate that the needs of those we serve are continually evolving, which necessitates that our firm continually innovate to ensure families can best navigate the increasing complexity at the intersection of their business, financial and personal lives. Tamara brings an energy and depth of experience that will perfectly complement our current team, and ensure we continue to be well positioned as a multi-generational firm serving multi-generational wealth long into the future. We couldn't be happier to have her as part of Legacy Bridge, and I know our clients will feel the same way."

About Legacy Bridge Private Family Offices

Legacy Bridge Private Family Offices was established by Founder and CEO Michael T. Zuendel to provide tailored wealth and investment management capabilities, and family office services to serve high-net-worth clients. The firm exists at the intersection of a client's family, their enterprise and wealth—the very complex space where the rational and emotional create ever-evolving dynamics that need to be carefully understood and expertly managed. The firm

is headquartered in West Des Moines, IA, with offices in Telluride, CO and New York, NY. To learn more, please visit <https://legacybridgepfo.com>.

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