

YOUR SERVICE TEAM



**MIDWEST
TRUST**
Founded 1993



BRADLEY BERGMAN

President
CEO

EXPERTISE:

- Trust management

EXPERIENCE:

- Founded Midwest Trust in 1993
- Has over 25 years' experience running trust companies
- Has also served as a commercial banker, a partner in a law firm and has taught law classes
- Provides financial advice to organizations that are as diverse as his interests in education, health care and wellness, and historical preservation

EDUCATION:

- BS, Illinois State
- JD, Washburn University

PROFESSIONAL/CIVIC AFFILIATIONS:

- Kansas Bar Association, member
- Missouri Bar Association, member
- Earned his Certified Financial Planner
- Estate Planning Society of Kansas City
- Johnson County Community College Foundation, member
- Blue Valley School District Advisory Board, member
- National World War I Museum, Trustee

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BRYAN ALLEE

Vice President
Trust Officer

EXPERTISE:

- Personal trust administration

EXPERIENCE:

- Joined Midwest Trust in 2002, after spending seven years with the Valley View State Bank as their vice president, trust officer, and director of their Personal Trust Services Division

EDUCATION:

- BA, William Jewell College, valedictorian
- JD, University of Missouri-Kansas City School of Law

PROFESSIONAL/CIVIC AFFILIATIONS:

- Musica Vocale, choral ensemble in Kansas City, member



BRAD BEETS

Senior Vice President
Relationship Manager

EXPERTISE:

- Began his career in retirement planning as a record keeper, which, along with his experience in accounting and trusts, has given him the experience, thoroughness, and technical understanding to handle complex plan administration

EXPERIENCE:

- Joined Midwest Trust in 2000, after serving five years as a vice president with UMB

EDUCATION:

- BS in Business Administration, University of Kansas

PROFESSIONAL/CIVIC AFFILIATIONS:

- Village Presbyterian Church, elder trustee
- Salvation Army, advisory board member
- Ozanam Guild, treasurer



SHELLIE BILLAU

Vice President
Trust Officer

EXPERTISE:

- Personal trust administration

EXPERIENCE:

- Joined Midwest Trust in 1993, after working with US Bank and UMB
- All told, Billau holds more than 30 years of personal trust experience

EDUCATION:

- Marymount College
- KBA-NBA School of Trust & Financial Planning

PROFESSIONAL/CIVIC AFFILIATIONS:

- Operation Breakthrough, auction committee member and volunteer
- Ronald McDonald House Charities of Kansas City, planned giving committee board member
- Alzheimer's Association, team member and volunteer

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DANA BLACKMON

Vice President
Trust Officer

EXPERTISE:

- Personal trust administration

EXPERIENCE:

- 36 years in the trust and investment management business
- Prior to joining Midwest Trust, served clients with U.S. Bank for 17 years
- She was also the principal of a privately owned trust company and registered investment advisory firm for 12 years

PROFESSIONAL/CIVIC AFFILIATIONS:

- Estate Planning Society of Kansas City, member
- The Central Exchange, member



LANA BRITZ

Vice President
Trust Officer

EXPERTISE:

- Specializes in trust and probate administration

EXPERIENCE:

- Joined Midwest Trust in 2005, after working for more than 20 years in the personal trust department at UMB

EDUCATION:

- BS in Business Administration, Rockhurst University
- Cannon Trust School

PROFESSIONAL/CIVIC AFFILIATIONS:

- Estate Planning Society of Kansas City, member
- Children's Mercy Hospital, planned giving committee
- Children's Mercy Hospital, Child Life volunteer



ANDREW BROWNE, CFTA, CFP®

Vice President
Trust Officer

EXPERTISE:

- Specializes in personal trust and IRA administration

EXPERIENCE:

- Brings 25 years of trust experience to his clients, earned as senior vice president at Bank of America and, since 1999, at Midwest Trust

EDUCATION:

- BS in Business Administration, University of Kansas

PROFESSIONAL/CIVIC AFFILIATIONS:

- Volunteer Center of Johnson County, former board member
- Leukemia Society, former golf committee member
- Heart Association of Kansas City, former golf committee member

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KURT CLAUSING

Vice President
Trust Officer

EXPERTISE:

- Developed an extensive knowledge of oil and gas law, real estate, probate, and trusts through his work as a practicing attorney and a trust officer

EXPERIENCE:

- Started in the trust industry in 1996 with UMB, after serving as partner at Hoke and Clausen law firm in Wichita, Kansas, and as in-house counsel for Continental Energy in Garden City, Kansas
- He joined Midwest Trust in 2005

EDUCATION:

- BA, University of Kansas
- JD, Washburn University
- Cannon Trust School

PROFESSIONAL/CIVIC AFFILIATIONS:

- Estate Planning Society of Kansas City, member



MARK DRAKE

Vice President
Trust Officer

EXPERTISE:

- Personal trust administration

EXPERIENCE:

- Joined Midwest Trust in 1999, after serving for 11 years as a vice president and trust officer at Bank of America

EDUCATION:

- BS in Journalism, University of Missouri-Columbia
- JD, University of Missouri-Kansas City
- ABA National Trust School

PROFESSIONAL/CIVIC AFFILIATIONS:

- Missouri Bar Association, member



DEBBIE CORCORAN

Vice President
Trust Officer

EXPERTISE:

- Personal trust administration

EXPERIENCE:

- Joined Midwest Trust in 2006, after serving as a trust officer with Gold Trust (now M&I Wealth Management) and UMB Trust Investments
- Debbie has extensive background in retirement planning and IRAs

EDUCATION:

- BS in Human Resources Management, Friends University



PATRICIA GROTHOFF

Vice President
Trust Officer

EXPERTISE:

- Personal trust administration

EXPERIENCE:

- Nearly 40 years of trust experience. Prior to joining Midwest Trust in 2002 and Valley View Financial Group Trust in 1994, Patty worked with Central Bank in Jefferson City and Southgate Trust.

EDUCATION:

- Lincoln University

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PHIL HEFFLEY, CFP®

Vice President
Trust Officer

EXPERTISE:

- Focuses on business development with skills in financial planning and private client retirement planning

EXPERIENCE:

- Over 25 years in the trust and investment management business
- Prior to joining Midwest Trust, Phil's experience includes 20 years with U.S. Bank
- 15 years as a presenter for Hallmark Cards at quarterly retirement planning seminars

EDUCATION:

- BS in Business Administration, University of Kansas
- BS in Mechanical Engineering, University of Kansas

PROFESSIONAL/CIVIC AFFILIATIONS:

- Estate Planning Society of Kansas City, member
- Catholic Charities Foundation-Kansas City and Saint Joseph Missouri, board member
- Catholic Charities-Kansas City and Saint Joseph Missouri, investment committee member



MELANIE HOLLAND

Vice President
Trust Officer

EXPERTISE:

- Personal trust administration

EXPERIENCE:

- Worked in trust administration for 29 years at US Bank before joining Midwest Trust in 2009

EDUCATION:

- AA, Johnson County Community College



DANIEL LANG

Executive Vice President
Trust Officer

EXPERTISE:

- Specializes in personal trust administration, fiduciary taxation, real estate management, and corporate structures within trust

EXPERIENCE:

- Joined Midwest Trust in 1998, after serving as vice president with NationsBank and Commerce Bank and as a customer service representative with Kansas City Life Insurance Company

EDUCATION:

- BS, Business Administration, University of Colorado
- MBA, University of Missouri-Kansas City

PROFESSIONAL/CIVIC AFFILIATIONS:

- Planned Gift Council of Children's Mercy Hospital, board member

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CHUCK MIKKELSEN

Vice President
Trust Officer

EXPERTISE:

- Specializes in personal trust administration and tax planning

EXPERIENCE:

- Joined Midwest Trust in 2005, after serving a sum total of nearly 25 years as vice president and trust officer at Community Bank, Citizen Bank & Trust, and First Trust & Savings Bank

EDUCATION:

- BS in Business Administration
- MA in Economics
- JD, University of Nebraska-Lincoln

PROFESSIONAL/CIVIC AFFILIATIONS:

- Mensa International, member



JEANINE MORTON, CFTA

Vice President
Trust Officer

EXPERTISE:

- Carries broad experience in banking, auditing, regulatory compliance, trust operation, and personal trust administration

EXPERIENCE:

- Joined Midwest Trust in 2001, after serving in various roles at First National Bank of Olathe and Lawrence National Bank
- Jeanine is a certified trust and financial planner with more than 20 years of experience

EDUCATION:

- BS in Education, with highest distinction, University of Kansas
- AIB Foundations of Banking Degree, Cannon Financial Institute

PROFESSIONAL/CIVIC AFFILIATIONS:

- Gateway West, LLC, treasurer
- Douglas County Estate Planning Council, member
- Lawrence Civic Choir, past board member and treasurer

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JAMES O'SULLIVAN

President, Valley View Financial Group
Trust Company

EXPERTISE:

- Trust and estate planning

EXPERIENCE:

- Has more than 20 years' experience in trust and estate business

EDUCATION:

- BA, University of Missouri, Columbia
- JD, University of Kansas

PROFESSIONAL/CIVIC AFFILIATIONS:

- Appointed to the Kansas State Banking Board as chairman (2008 & 2010) by Governor Kathleen Sebelius
- Kansas Bar Association, member
- Missouri Bar Association, member



CAROLYN RIGSBY, CFP®

Vice President
Trust Officer

EXPERTISE:

- Specializes in personal trust, corporate trust, and operations

EXPERIENCE:

- Has more than 20 years of experience in trusts and financial planning, first with First City Bank of Corpus Christi and later US Bank and First Financial Trust Company in Albuquerque
- Carolyn joined Midwest Trust in 1995

EDUCATION:

- Emporia State University



EILEEN SULLIVAN

Vice President
Trust Officer

EXPERTISE:

- Personal trust administration

EXPERIENCE:

- Joined Midwest Trust in 2004, after a distinguished career in estate planning and trusts with EBK Trust Company, Overland Park State Bank, and Boatman's Bank
- Eileen is a certified employee benefit specialist

EDUCATION:

- BA, Trinity College, Washington, D.C.
- JD, University of Missouri School of Law
- Certified Employer Benefit Specialist (CEBS)

PROFESSIONAL/CIVIC AFFILIATIONS:

- Native Sons and Daughters of Kansas City, member
- Rockhurst University, honorary director
- Estate Planning Society of Kansas City, member
- Estate Planning Symposium Committee, board member
- Missouri Bar Association, member

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EMILY WEST, CFP®

Vice President
Investment Officer

EXPERTISE:

- Personal trust financial planning

EXPERIENCE:

- Joined Midwest Trust in 2011, after spending 5 years with UMB most recently in Private Banking and Wealth Management.

EDUCATION:

- BBA in Finance, Baylor University
- MBA in Finance, University of Missouri-Kansas City

PROFESSIONAL/CIVIC AFFILIATIONS:

- Member, United Way Young Leaders Society



DAVID YOST

Executive Vice President
Personal Trust Manager

EXPERTISE:

- Trust management

EXPERIENCE:

- Joined Midwest Trust in 2007, bringing with him 18 years experience in trust and investment strategies at Bank of America

EDUCATION:

- BA, JD, University of Missouri-Kansas City

PROFESSIONAL/CIVIC AFFILIATIONS:

- University of Missouri-Kansas City, trustee
- University of Missouri-Kansas City Athletic Foundation, chair
- Synergy, board member
- Northland Alternative Services Program, board member