Trust & Investment Services

Investment Management | Estate & Financial Planning | Retirement Planning
Corporate Trustee | Living Trust Management | Agent for Trustee
Asset Protection Trusts | Custodian

LGFCU
LOCAL GOVERNMENT
FEDERAL CREDIT UNION
800.344.4846 | www.lgfcu.org

How We Do It

Local Government Federal Credit Union's (LGFCU) partner, MEMBERS® Trust Company, supplements our financial planning services to members. Since 1987, MEMBERS Trust Company has met the special needs of credit union members by providing trust and asset management services. In 2003, MEMBERS Trust Company converted to a Federal thrift chartered by the Office of Thrift Supervision, enabling it to offer services to members across the United States.

Service Philosophy

What is in the best interest of the member is the central question and guiding principle that serves as the bedrock for decisions made by credit union management. Similarly, MEMBERS Trust Company, an organization owned by and for credit unions, adopts the same principal in the management of its operations and services. When you entrust us with assets to manage, you are more than just a customer, you become a valued member of our company.

Your Local Trust Officer

Sharon A. Krizic, CTFA, CFP®, has worked in all facets of the trust and investment management industry for more than 24 years. She graduated from the University of Illinois with a degree in Criminal Law. In 1990, she earned her Certified Financial Planner (CFP) designation and later attended National Trust School and National Graduate Trust School, graduating in 1996. She earned her Certified Trust and Financial Advisor (CFTA) designation in 1996 as well.

Sharon is a member of the national Financial Planning Association (FPA) and former member of the South Suburban Estate Planning Council in Chicago where she resided until joining Local Government Federal Credit Union as the Financial Planning Manager. Having served on several community boards and charity organizations over the years, Sharon is excited to work with LGFCU members to develop long-term investment strategies.

MEMBERS® Trust Company | Trust & Investment Services for Credit Union Members

Trust & Investment Senior Team

Tom E. Walker has been President/CEO of MEMBERS® Trust Company since its inception in 1987. He holds a B.S. in Business from Samford University, Birmingham, Alabama, an MBA from the University of Alabama and J.D. from the Birmingham School of Law. Mr. Walker is licensed to practice law in the state of Alabama.

Denise Giansante, VP Chief Fiduciary Officer, has over 23 years experience in trust administration and estate settlement. She graduated Magna Cum Laude from New Hampshire College in Hooksett, New Hampshire with an Accounting Degree.

John M. Largent, CFA, CFP®, CAP, Chief Investment Strategist, with over 20 years experience in the investment management industry, graduated from the University of Arkansas, Sam M. Walton College of Business and received his MBA in 1985.

Neil P. Archibald, Corporate Counsel/Chief Compliance Officer, earned his B.A. in English Literature from the University of Virginia and continued to obtain his J.D. from the University of Maryland School of Law. Mr. Archibald is a member of the Florida Bar and is licensed to practice law in the state of Florida.

Sheldon Reynolds, CFA, VP Trust & Investments, graduated from Appalachian State University, Walker College of Business where he obtained his B.S. in Business Administration. He has over 16 years of experience in wealth management.

Tim Kenczewicz, President, Western Division, has served as President, CEO and Chairman of the Board of MetLife Trust Company, NA, and President & CEO of Key Trust Company of Florida. With more than 27 years of experience, Tim holds a bachelors and a law degree from the University of Toledo and is licensed to practice law in the state of Colorado.

Kate Braddock, CFA, VP/Chief Investment Officer, Kate has 19 years experience in financial services. She graduated cum laude from the University of Vermont with a B.A. in Economics.

Marcy Carroll, VP/Denver Market Manager, has more than 18 years experience in personal trust and estate administration, trust investments, and trust and estate tax preparation. Marcy holds a law degree from the University of Colorado and is licensed to practice law in the state of Colorado.

Trust Service Office

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Corporate Office

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LGFCU®
LOCAL GOVERNMENT FEDERAL CREDIT UNION

Owned by

Credit Unions and Affiliates

Our Locations

California
Colorado
Florida
Georgia
Illinois
Indiana
Massachusetts
Nevada
New Mexico
New York
North Carolina
Ohio
Texas
Utah
Virginia
Wyoming