CLAYTON & McKERVEY

Clayton & McKervey is a full-service CPA firm helping middle-market entrepreneurial companies compete in the global marketplace. The firm is headquartered in metro Detroit and services clients throughout the world. The closely held businesses and owners we serve represent the manufacturing, distribution, industrial automation and professional service industries. Our suite of services include tax, accounting, consulting, and wealth transfer strategies for entities, individuals and families. To learn more, visit claytonmckervey.com.

Comerica

Comerica Wealth Management's goal is to provide best-in-class wealth management services and solutions, thought leadership, and trusting relationships to help wealthy individuals, families, and business owners/organizations manage their wealth and meet their financial goals by addressing their greatest and most pressing financial concerns. Our comprehensive, team-based approach to wealth management is designed to bring a client's full financial picture together, allowing us to provide expertise, tailored solutions and personalized service to help clients accomplish their goals. From legacy planning to wealth preservation, asset management to specialized financing, Personal Wealth's team of dedicated advisors, planners and strategists work hand-in-hand to create a balanced road map for our clients' financial futures.

Greenleaf Trust is a privately held wealth management firm with specialized disciplines in asset management, trust administration, qualified retirement plan administration, and family office advisory services. With close to $14 billion in assets under advisement, we are among the nation's largest independently owned wealth management firms; by virtue of our exemplary, client-first culture and depth of actionable expertise, we are also among the best. Our business model is predicated solely on our clients' financial success. Client-aligned and talent-driven, we adhere to the highest standards of fiduciary excellence, while harnessing the most robust technologies, sophisticated investment platforms and comprehensive reporting tools. In 2019, we celebrated twenty-one consecutive years of mid-double digit growth while maintaining an outstandingly high level of client retention.

Aaron Sherbin is a Partner at Jaffe Raitt Heuer and Weiss, P.C. and leads their Estate & Wealth Planning practice group while also working closely with their Mergers & Acquisitions and Tax practice groups. He specializes in estate plan design, trust and estate administration, wealth preservation and transfer, and strategic business planning services for closely-held companies and family businesses. Aaron also serves as a transactional attorney.

Jaffe Raitt Heuer & Weiss, P.C. was founded in 1968 by entrepreneurially-minded attorneys with a common vision: to form a full service law firm dedicated to providing exceptional hands-on, responsive, and solutions-oriented legal services. The firm is proud of its work and is committed to serving its clients, celebrating our inclusive company culture, and giving back to the community.

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Maddin Hauser Roth & Heller PC
attorneys and counselors

Maddin, Hauser, Roth & Heller, P.C. is a multi-specialty law firm serving individuals, businesses and governmental entities.

- We deliver result-focused legal services based upon deep knowledge of our clients and the industries we serve.
- Client trust is founded upon our responsive, expert, cost-effective and “no-nonsense” practical approach.
- We translate this value proposition into a positive experience for every client, every day.
- Our practice areas include:

Alternate Dispute Resolution
Appellate
Bankruptcy
Restructuring and Debtor-Creditor Rights
Complex Litigation and Risk Advisory
Corporate and Business
Defense and Insurance Coverage
Employee Benefits
Employment and Workforce Management

Environmental
Estate Planning and Probate
Financial Services and Real Property Litigation
Franchise and Distribution
Health Care
Property Tax Appeals
Real Estate
Tax
Technology and Computer