

# **TMI TRUST COMPANY ACCEPTS THE TRUSTEE AND CUSTODY SERVICES PORTFOLIO FROM BMO GLOBAL ASSET MANAGEMENT'S FAMILY OFFICE BUSINESS**

Ft. Worth, TX, July 31, 2017 /PRNewswire/ -- TMI Trust Company (TMI), a Texas trust company, announces it has accepted the trustee and custody services portfolio for the Family Office business from BMO Trust and Custody Services, part of BMO Global Asset Management. TMI will provide fiduciary, accounting and trust tax services for those family offices and investment partnerships.

As a part of the transition, TMI Trust Company will take on trust and custody services for the portfolio of family clients, the staff who serve in relationship and operational roles, the supporting systems, and the office locations in Milwaukee and Appleton, WI and Naples, FL.

Anthony A. Guthrie, Executive Chairman of TMI Trust Company commented, "These services are a very good fit for TMI. They complement our existing niche oriented fiduciary and custodial services and we can support the needs of our clients with our high level of service delivery and the capabilities of our new team members."

Steven B. Eason, CEO and President of TMI Trust Company said, "We are delighted to welcome the clients and the new team to the TMI family." Eason added, "We have had a smooth transition of the acquisition and are excited about what this adds to the continued growth trajectory of TMI."

Ken Krei, a seasoned financial services executive, has joined TMI as Vice Chairman to lead the effort to build out the continued strategy for growing the unique product capabilities obtained through this transfer of business. Before joining TMI, Krei most recently served as Executive Vice President at FIS, Executive Vice President and Head of BMO Global Private Bank, Chairman, President and CEO of Marshall & Ilsley Trust Company and Chairman and CEO of M&I Investment Management Corp.

Gordon Jakus has joined TMI from BMO as Senior Vice President and will manage the service and accounting teams on a day-to-day basis.

Kristy Perez, Vice President, Managing Director of Trust and Custody and Taft Hartley Services at BMO Global Asset Management, also commented, "We wanted to ensure the ongoing quality of care for the clients and with TMI Trust Company we are confident that their expertise, dedication and commitment will exceed client expectations."

## **About TMI Trust Company**

TMI Trust Company was founded in 1954 as a Texas chartered trust company and is headquartered in Ft. Worth, TX. Since its inception, TMI has grown into a full-service trust and agency services provider.

Through its offices located in Ft. Worth (TX), Atlanta (GA), Appleton and Milwaukee(WI), and Naples (FL) TMI delivers exceptional client care across four primary service categories: Trustee, escrow and loan agency; IRA and custody; family office and investment partnerships; and specialized trust services.

## About BMO Financial Group

BMO Trust and Custody Services is a part of BMO Global Asset Management and a division of the BMO Harris Bank N.A., offering products and services through various affiliates of BMO Financial Group.

BMO Global Asset Management is the brand name for various affiliated entities of BMO Financial Group that provide investment management and trust and custody services. Certain of the products and services offered under the brand name BMO Global Asset Management are designed specifically for various categories of investors in a number of different countries and regions and may not be available to all investors. Those products and services are only offered to such investors in those countries and regions in accordance with applicable laws and regulations. BMO Financial Group is a service mark of Bank of Montreal (BMO).

Established in 1817, and currently marking its 200th year of operations, BMO Financial Group is a highly diversified financial services provider based in North America. With total assets of \$719 billion as of April 30, 2017, and more than 45,000 employees, BMO provides a broad range of personal and commercial banking, wealth management and investment banking products and services to more than 12 million customers and conducts business through three operating groups: Personal and Commercial Banking, Wealth Management and BMO Capital Markets.

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