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Blue Trust Family Office Opens Satellite Office in Orange County

Family Office Division Expands Their Presence to West Coast

Blue Trust announced that two employees from Ronald Blue & Co. CPAs are transitioning to its family office division. As a senior family office advisor, Jim Summers is opening a satellite location in Orange County, CA, effective December 4.

At Ronald Blue & Co. CPAs, Jim served as a senior tax partner and lead advisor for a significant family office client. Jim's focus areas include family businesses, trusts and estates, multigenerational planning, and wealth transfer for high-net-worth families. Melanie Allen is also transitioning over as a family office client service manager. At Ronald Blue & Co. CPAs, Melanie assisted Jim with his tax and family office clients.

"In the early 90s, God called me to Ronald Blue & Co., and I was on track to have a separate office in Ontario, CA. I later joined George Andrews Sr. in his Orange County, CA office late in 1996," Jim shared. "I am excited to return to my original passion of advising families on how to be good stewards of the assets (family and finances) God has entrusted to them."

"We are thrilled to have Jim and Melanie join our family office division and welcome them to our team," said Scott Calhoun, managing director of the family office division. "We look forward to how they can help lead our family office expansion efforts on the West Coast."

To learn more about the family office division or Blue Trust, please reach out to the firm at info@bluetrust.com.

About Blue Trust

With over \$14.5 billion of assets under advisement and a nationwide network of 17 offices, Blue Trust offers comprehensive financial services and objective advice to 10,500 clients across the wealth spectrum in all 50 states. (as of 06/30/23 and subject to change). 17688683-12-23

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