

Midwest Taft-Hartley Services

Our strength is in our people



Midwest Taft-Hartley Services understands the special demands placed on Taft-Hartley Funds and Union/Labor related entities.

We offer a combination of experience and services to support your needs:

- **A team approach:** Comprehensive, pro-active, personalized service from professionals with more than 300 years total experience serving Taft-Hartley clients.
- **Customized service models:** Designed to meet the specific needs of each Taft-Hartley fund and its team of professionals.
- **Investment neutrality:** The freedom to work with your chosen investment managers.
- **Risk management framework:** Attention to compliance standards and risk mitigation.

Our commitment to labor

- Corporate UPS contract
- Support and utilize Union printers
- Labor community representatives part of Taft-Hartley Services Team
- Ongoing annual support of Labor/Union related community and members
- Property Management commitment to include signatory contractors in project opportunities, both remodel and new construction
- Support of Teamsters National Black Caucus Conference
- Support of Tradeswomen Build Nations Conference and Scholarship Fund
- Active member of International Foundation of Employee Benefit Plans

REPRESENTATIVE CLIENT LIST

- Bricklayers and Allied Craftworkers (B.A.C.)
- Building Trades
- Carpenters
- Cement Masons
- Ceramic Tile and Marble Masons
- Glaziers and Glassworkers
- Graphic Communications
- Heat and Frost Insulators and Allied Workers
- International Association of Theater and Stagehands (I.A.T.S.E.)
- International Brotherhood of Electrical Workers (I.B.E.W.)
- International Brotherhood of Teamsters
- Ironworkers
- Laborers
- Maritime Workers
- Operating Engineers
- Painters
- Plumbers and Pipefitters
- Roofers
- Sheet Metal Workers
- Tile Finishers
- United Food and Commercial Workers (U.F.C.W.)

Our mission statement

To be the full-service financial services provider of choice by delivering customized trust and coordinating banking solutions with unparalleled service and integrity—one client, Fund, Trustee, servicing professional and member at a time.

Our credentials

- Through our legacy organizations, we have provided **trust and custody services since 1924**
- Custody/safekeeping of assets
- Discretionary asset management
- Global securities lending
- Support of employer contribution processing
- Coordinated commercial banking and treasury management services

Taft-Hartley Services



Our clients can depend on the strength of our people

Our team

Midwest Taft-Hartley Services brings a depth of experience to each relationship. Relationship managers have extensive benefit plan experience and are knowledgeable in a wide variety of service model types. Equally important, each relationship manager is backed by a team of specialists, allowing Midwest Taft-Hartley Services to provide proactive, highly personalized service.

**Daphne O'Keefe**

Senior Relationship Manager
Midwest Taft-Hartley Services
206-422-2955
Daphne.OKeefe@Midwest
InstitutionalTrust.com

**Ramona Griffin**

Senior Account Manager
Midwest Taft-Hartley Services
414-255-1981
Ramona.Griffin@Midwest
InstitutionalTrust.com

**Angela Brown**

Senior Account Manager
Midwest Taft-Hartley Services
414-255-1945
Angela.Brown@Midwest
InstitutionalTrust.com

**Tamara (Tami) Antholine**

Transition Manager
Midwest Taft-Hartley Services
414-255-1955
Tamara.Antholine@Midwest
InstitutionalTrust.com

**David (Dave) Gibowski**

Head - Account Managers
Midwest Taft-Hartley Services
414-255-1950
Dave.Gibowski@Midwest
InstitutionalTrust.com

**Sammuel (Sam) Perez**

Head - Relationship
Coordinators
Midwest Taft-Hartley Services
414-255-1985
Sammuel.Perez@Midwest
InstitutionalTrust.com

**Peter Madsen**

Head - Business Support
Midwest Taft-Hartley Services
414-255-1979
Peter.Madsen@Midwest
InstitutionalTrust.com

**Kristy Perez**

Executive Vice President,
Managing Director
Midwest Taft-Hartley Services
702-596-6357
Kristy.Perez@Midwest
InstitutionalTrust.com

**Mike Coyne**

Labor Liaison
Midwest Taft-Hartley Services
202-257-2596
THS@Midwest
InstitutionalTrust.com

**Mike Ruggieri**

Labor Liaison
Midwest Taft-Hartley Services
401-559-6003
THS@Midwest
InstitutionalTrust.com

**Rikki Perez**

Consultant Relations and
Business Development
Midwest Taft-Hartley Services
414-255-1938
Rikki.Perez@Midwest
InstitutionalTrust.com

For additional information or a personal presentation of our services, please contact the Midwest Taft-Hartley Services team.



800-588-9330



THS@MidwestInstitutionalTrust.com



MidwestInstitutionalTrust.com

