

Spotlight on All Charities Preferred Partners: Northern Trust and Marsh McLennan Agency Private Client Services (MMA PCS)

By Richard Weinstein
President and COO, ORCF

Not long after Net Jets started as the very first preferred partner for All Charities we were fortunate enough to have both Northern Trust and MMA

PCS follow closely. Since that time they have both remained consistent partners and steadfast in their focus on serving a wide variety of financial and insurance needs.

For Northern Trust that comes in the form of Will Erwich. He notes right off that his connection with Ocean Reef is a personal one with so many Members, and that working in this community has been a very meaningful part of his professional career. Arriving South Florida with his family (wife, Kim and daughters, Madeline, Georgette, and Estelle) in late 2007, he set to work professionally advising Members, first as an Insurance Advisor with MMA PCS, and for the last 12-13 years as a Wealth Management professional for the Northern Trust Company.

We see a similar story from MMA PCS. Since

2015, Meg Dieppa has been Ocean Reef's key partner contact with MMA PCS and brings sophisticated insurance solutions to clients whose lives are anything but ordinary.

Meg notes, "Ocean Reef holds a special place in my heart, truly living up to its unique reputation. It is a community centered around family and traditions, which aligns perfectly with the values of my own family. My husband and I have been happily married for 30 years, we have three sons, and recently welcomed our first granddaughter. I am incredibly grateful for the meaningful friendships I've formed over the years in this community."

Both Northern Trust and MMA PCS are uniquely positioned to support Members. Northern Trust has the scale of capabilities of the

nation's largest Trust Banks and will manage and protect client assets as if they were their own; all while delivering service that represents its mindful and personable midwestern roots in Chicago. Meanwhile MMA PCS provides the personal service, global reach and resources along with in-depth industry knowledge to make sure you're personally protected in the moments that matter.

Both provide clients with actionable advice so they are best prepared for the inevitable changes that will come from both outside influences and the changing needs of your family.

Will would be happy to visit with anyone who has questions about his services. Contact Will Erwich at 305-789-1431 (we9@ntrs.com) and Meg Dieppa at 786-449-2307 (meg.dieppa@marshmma.com).