



SOUTH FLORIDA

citybizlist

Coral Gables Trust Company Adds Trio Of Executive Leaders To Firm

October 20, 2016

Coral Gables Trust Company (“CGTC”), a leading provider of wealth management and trust services in South Florida, is pleased to announce three executive-level new hires: Denise Nuñez Casale, Vice President and Senior Wealth Advisor; Gerardo Rodriguez, Vice President Investment Officer; and Nelson Hernandez, Wealth Advisor and Investment Associate.

Denise M. Nuñez Casale is a financial industry veteran, having served in a myriad of wealth management and leadership roles for the past two decades throughout South Florida. As Vice President and Senior Wealth Advisor for Coral Gables Trust Company, Casale will oversee the development and management of complex portfolios for high-net-worth clients, offering an array of investment solutions, financial planning, trust and estate services. Prior to joining the firm, she was the founder of DMC Financial Consulting in Fort Lauderdale, offering market financial services to individuals and small businesses. Before assuming that role, Casale was Vice President and Senior Investment Advisor for TD Wealth covering South Florida – where, in five years, she grew the company’s book of business, from inception, to \$78 million in assets under management. Casale was also with Bank of America for 15 years and received multiple awards for her work during her time there. She has additionally served in management and client advisory roles within retail and private banking. Casale attended the Florida Atlantic University College of Business where she is now a CFP candidate. She holds a Bachelor of Arts in Psychology with a concentration in Industrial Psychology from Seton Hall University in South Orange, N.J., and holds a series of securities and insurance licenses.

Gerardo Rodriguez brings more than 16 years of investment management experience to Coral Gables Trust Company with a concentrated focus on the portfolio management of ultra-high-net-worth and high-net-worth individuals, institutions and family offices. In his role as Vice President Investment Officer for the firm, Rodriguez will utilize his keen expertise and understanding of trading, research and client management to develop results-driven strategies to meet the needs of clientele. In his most previous role,

Rodriguez served as VP Investment Consultant at Coconut Grove Bank in Miami, Florida where he managed client portfolios, recommended asset allocations based on client needs, researched investment ideas and provided high-caliber service to his clients. He has additionally worked at other institutions in South Florida, such as UBS International, Banco Santander International, EFG Capital International and Banco Itau Europa, among others, where he specialized in asset allocation and investment analysis. Rodriguez holds a Master of Business Administration and a Bachelor of Science in Business Administration from Florida International University. He is involved with the Coral Gables Chamber of Commerce and most recently, The Nicklaus Children's Hospital Foundation. An avid cyclist, Rodriguez resides in South Miami with his wife, Lourdes, and their two children.

Nelson Hernandez joins Coral Gables Trust Company as Wealth Advisor and Investment Associate, handling a wide range of client needs with an emphasis on the implementation of new technology and comprehensive services. Before joining the firm, he was an Associate/Analyst for Wells Fargo Private Bank in Miami, FL. Prior to this role, Hernandez was elected Council Member for the Town of Miami Lakes, completing his term in 2013. He is additionally a gubernatorial appointee to the South Florida Regional Council, and was appointed by the Miami-Dade County Board of County Commissioners to serve on the Housing Finance Authority of Miami-Dade County. An active advocate for the local community, Hernandez serves on the Executive Board of the United Way of Miami-Dade County Young Leaders Society and regularly volunteers his services for related events. Hernandez holds a Master of Business Administration degree with a focus in Finance and Accounting from the University of Miami, and a Bachelor of Arts degree in Economics and Political Science from Florida State University.

"We are thrilled to welcome this dynamic trifecta of leaders to our firm who will clearly further our company's growth in South Florida," said John Harris, Managing Director, Chief Wealth Advisor of Coral Gables Trust Company. "These are seasoned executives who bring a wealth of knowledge and experience to the firm, and we look forward to seeing their capabilities further our overall client experience."



<http://southflorida.citybizlist.com/article/382548/coral-gables-trust-company-adds-trio-of-executive-leaders-to-firm>