

JULY 2024

STROLL®

Cocoplum

Que Rico!

CHARY RICO TORO: A BELOVED COCOPLUM
NEIGHBOR, ARTIST, PHILANTHROPIST
& FRIEND

DELIVERING NEIGHBORHOOD CONNECTIONS

Michelle Daley Peters, Robert Penafiel and Sabrina Izquierda



Looking Back: Coral Gables Trust hosts a fleet of professional organizations at Regatta Grove in Miami.

In the latter part of spring, Coral Gables Trust hosted a fleet of six like-minded professional organizations at Regatta Grove in Coconut Grove on Thursday, May 2, 2024, bringing together over 200 financial and estate planning professionals for food, cocktails, entertainment and an evening of bay-side networking.

One of the fastest-growing trust and wealth management firms headquartered in Florida and a leading provider of Wealth Management, Trust and Estate, and Financial Planning services, Coral Gables Trust, partnered with the Estate Planning Council, the Financial Planning Association, the Society of Trust & Estate Practitioners, the Miami-Dade Bar Association Young Lawyers Section, the Chartered Financial Analyst Society and the Florida Institute of Certified Public Accountants to host this event.

“We are delighted to launch this multi-group professional cocktail reception, bringing together the leaders in the fields of accounting, financial planning, wealth management and Trust and Estate Planning for an evening of collaboration and a sense of community,” said John W. Harris, Managing Director of Coral Gables Trust. “With events being sidelined in recent years stemming from Covid, we are thrilled to have

the opportunity to form this collaborative professional event so executives can once again engage in-person with one another and reignite the connections that make events like these so invaluable.”

Guests enjoyed a dazzling array of seafood fare and spirits, a variety of entertainers, and several premium bottles of wine were raffled off, adding an element of excitement to the evening. As attendees enjoyed music and waterfront views of Biscayne Bay, they engaged in conversations and forged new relationships that will undoubtedly lead to future opportunities.

“The Spring Networking Event at Regatta Grove exemplifies the spirit of collaboration and community that defines Coral Gables Trust and its partners,” said Donald A. Kress, CEO and President of Coral Gables Trust.

Event sponsors included Coral Gables Trust, Tax Efficient Solutions LLC, Pension Services Inc., J.P. Morgan, Chicago Atlantic, Charities Aid Foundation (CAF), Hyer End Homes/Keller Williams, Hindman Auctions, Coral Gables Community Foundation, and Schafer Cullen Capital Management.

STROLL COCOPLUM PARTNERS IN THE NEWS



Coral Gables Trust Hosts Fleet of Professional Organizations at Regatta Grove



Coral Gables Trust Hosts Fleet of Professional Organizations at Regatta Grove



Chuck Runge, Leslie Calero, Elizabeth Rader, John and Maria Harris



Oliver Ranft and Yolanda Perez



Raul Marcos and Josh Blum



Saidin Hernandez, Olga Santini and Madelayne Cordero

Founded in 2004, Coral Gables Trust has grown from a startup in Coral Gables to become the leading independent, privately-owned trust company in South Florida with 40 professionals, and additional offices in Fort Lauderdale, Boca Raton, and West Palm Beach.

For more information, please visit <https://cgtrust.com>.

Stroll

Stroll is the premier publisher of affluent neighborhood magazines, reaching millions of homeowners in upscale communities since 2004. Stroll introduces different neighbors each month by sharing their stories and photos in the magazine. And through Business Spotlight stories, advertising, and in-person events, residents meet the people behind local businesses as well.

UVM: 7,434