

# Coral Gables Trust Celebrates 20th Anniversary Milestone and Reaches \$2.5 Billion In Assets Under Management

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## CORAL GABLES TRUST

**Coral Gables Trust**, 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, has reached two milestones – 20 years in business and **\$2.5 billion** in assets under management and administration, a significant increase over \$1 billion just seven years ago.

To mark the occasion, the firm hosted a celebration on November 20 at La Jolla Ballroom in Coral Gables, attended by more than 130 guests, including clients, employees, and city leaders. Highlighting the event was a special proclamation from the City of Coral Gables presented by Mayor Vince Lago, recognizing the firm's contributions to the community over the past two decades.





“Celebrating this huge achievement has given us the opportunity to reflect on our extraordinary growth and accomplishments over the past two decades,” said **Donald A. Kress**, CEO and President of Coral Gables Trust. “This year we continue to see strong progress in our team’s capabilities, size and quality; our offices in Fort Lauderdale, West Palm Beach and Boca Raton are having an amazing year, while upholding our strong position and standards both professionally and in our community. It is our privilege to be able to operate at such a high level to give our clients the best service possible.”

Founded in 2004, Coral Gables Trust was established to provide transparent, high-level wealth management for clients which may have investable assets below the minimum required by most of the larger national institutions – inclusive of affluent individuals and families, small to medium-sized companies, foundations, and pension and endowment funds. The Firm has forged a reputation as the gold standard in trust and wealth management services – growing from a startup with a headquarters in Coral Gables, to becoming the leading independent, privately-owned trust company in South Florida with 40 professionals in three additional offices in Fort Lauderdale, Boca Raton and West Palm Beach.



“Reaching this milestone anniversary and \$2.5 billion in assets under management is a testament to the dedication and expertise of our team,” said **John W. Harris**, Managing Director of Coral Gables Trust. “As we celebrate 20 years, we are energized by the continued momentum we’ve built and are committed to driving even greater success in the years to come. Our focus remains on delivering exceptional service and innovative solutions that meet the evolving needs of our clients.”

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

### **About Coral Gables Trust**

Coral Gables Trust (CGT) is the largest and fastest-growing independent and privately held trust and wealth management company headquartered in South Florida and is a leading provider of Trust and Estate, Wealth Management, and Financial Planning services for clients throughout the State, nationwide, and internationally. Devoted to putting our clients’ interests first, CGT provides conflict-free services, personalized advice, open-architecture institutional quality (no proprietary products), and asset-based fees.

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