

News release

March 16, 2023: leafplanner® Announces Appointment of Jonathan Ruga to Board of Directors

([BUSINESS WIRE](#))--[leafplanner](#), a leading SaaS platform to organize, map, and share information about a family and family enterprise, announced today that Jonathan M. Ruga, CEO of [Sentry Financial](#), has joined its Board of Directors. Mr. Ruga and Sentry Capital led an investment round in leafplanner, Inc., which included several family offices and seasoned investors.

Ruga brings a wealth of experience to the Board of Directors. He is a senior executive with broad experience in leadership, strategic planning, finance, and transaction structuring (background includes M.B.A., C.P.A., J.D.). As the CEO of Sentry Financial, he is integrally involved in all of its divisions: Equipment Financing, Real Estate, and Private Equity. With his extensive experience investing and developing small companies, he is poised to provide invaluable guidance to leafplanner as it continues to grow.

"We are thrilled to welcome Jonathan to our Board of Directors," said Josh Kanter, Founder and CEO of leafplanner. "His wealth of experience will be invaluable to us as we continue to scale and develop. We are excited to work closely with him and Sentry Financial to deliver the best possible outcomes for our clients."

The addition of Ruga to the Board broadens leafplanner's leadership team as it continues to drive innovation and growth in the HNW and UHNW wealth advisory industry.

"The Sentry team is excited to have joined leafplanner's investor group, and I welcome the opportunity to contribute as a member of leafplanner's Board," said Ruga. "With its impressive executive team, supportive Board, and abundant growth capital, the company is positioned to substantially increase its sales trajectory as it delivers superior solutions to an underserved market."

About leafplanner

[leafplanner](#) is charting new territory as it establishes itself at the intersection of FinTech, professional services technology, and family office management to enable families of wealth to be better educated, engaged, empowered, and prepared. Having productized over three decades of wealth advisory and risk management expertise, leafplanner's software platform enables clients to apply a family office lens to the collection, organization, and mapping of a family's and family enterprise's information which, in turn, allows a family to identify blind spots, take proactive and corrective actions, resulting in an effective, comprehensive, and efficient succession and succession of information.

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About Sentry Financial

Sentry Financial is a diversified financial services firm headquartered in Salt Lake City, Utah, which was co-founded in 1986 by Jonathan M. Ruga and Scott F. Young, and which has completed more than \$4B in transactions to date. Sentry operates across three divisions: Equipment Financing, Real Estate, and Private Equity. Sentry invests in companies and projects that have high growth potential and which positively impact their communities.

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