Lisa Russell, CFA

Chief Investment Officer

PEAK TRUST COMPANY

About Lisa

Lisa Russell started with Peak Trust Company in 2003 and currently serves as Chief Investment Officer. Lisa specializes in designing unique investment programs for high-net-worth clients and trust accounts. She is highly attuned to the tax consequences of investment actions.

Lisa has over 25 years of investment experience. Prior to joining Peak Trust Company, Lisa held investment positions at other firms, most recently at US Bank, where she worked with high-net-worth individuals as a Senior Portfolio Manager.

Lisa holds a Master of Business Administration in Finance from Emory University and a Bachelor of Science in Business Administration from the University of Southern California. Lisa holds the designation of Chartered Financial Analyst (CFA), and is a member of the CFA Institute and the CFA Society of Seattle.

LISA RUSSELL, CFA
Chief Investment Officer

Talk to Lisa

Have a question about an advanced planning technique? Our seasoned experts are just a phone call away.

(888) 544-6775

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About Peak Trust Company

Peak Trust Company serves estate planners looking for a professional trustee, who want **reliable and accessible expertise** to help them with their client's complex trust plans.

Peak Trust Company offers the **experience and sophistication** to help you quickly and accurately establish trusts, backed by easy-to-use ongoing trust administration.

Unlike traditional banks and trust companies, at Peak Trust Company, your trust is our core business. This enables us to provide a highly **customized delivery process** tailored to your specific needs and an unbundled service structure; providing everything you need but only what you want.

Peak Trust Company serves as trustee of trusts nationwide, specializing in administration for trusts pursuant to Alaska or Nevada law.