PEAK TRUST COMPANY

Lisa Russell, CFA

Chief Investment Officer

Lisa Russell has been an integral part of Peak Trust Company since 2003. As Chief Investment Officer, she plays a pivotal role in the company's success by designing and implementing unique investment programs tailored to the specific needs of high-net-worth clients and trust accounts. With over 25 years of investment experience, Lisa's expertise in navigating the complex world of investments, coupled with her keen understanding of the tax implications of investment decisions, sets her apart in the industry.

Prior to joining Peak Trust Company, Lisa honed her skills at several prestigious firms, including her most recent position as a Senior Portfolio Manager at US Bank. In this role, she worked closely with high-net-worth individuals, developing and managing investment strategies that aligned with their financial goals and risk tolerance.

Lisa holds a Master of Business Administration degree in Finance from Emory University, and a Bachelor of Science in Business Administration from the University of Southern California. Lisa has earned the prestigious designation of Chartered Financial Analyst (CFA). As a member of the CFA Institute and the CFA Society of Seattle, Lisa stays connected with her peers and remains at the forefront of industry developments.

Talk to Lisa

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

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