



Jeannie Fanning

Chief Operating Officer



Jeannie Fanning serves as Chief Operating Officer at Peak Trust Company, working closely with the Chief Executive Officer and Leadership Team to advance the firm's strategic vision and operational excellence. In this role, she is responsible for overseeing day-to-day operations, ensuring that the firm's strategic priorities are effectively executed across all departments.

As a key member of the executive leadership team, Jeannie plays an integral role in shaping and implementing firmwide strategy. She partners with leadership to develop long-term strategic initiatives, translate high-level objectives into actionable plans, and monitor progress against defined goals. Through strong organizational alignment and clear accountability, she helps ensure that priorities remain focused and execution remain consistent.

Jeannie provides leadership over cross-functional operations, driving collaboration and efficiency across the organization. She leads high-impact initiatives, develops performance metrics, and implements scalable systems to support growth. Her work includes structuring teams, integrating technology, strengthening quality, and advancing continuous improvement. Through clear communication and change management, she enhances operational effectiveness and the client and employee experience.

With more than 20 years of experience in people centered leadership, compliance, and organizational change management, Jeannie brings a disciplined and strategic approach to service operations. She has deep expertise in workflow optimization, regulatory compliance, risk management, and data-driven decision-making, as well as leading large-scale initiatives from development through execution. Her leadership emphasizes accountability, collaboration, and sustainable growth.

Holding a Bachelor of Arts degree in Counseling Psychology from Alaska Pacific University, Jeannie's leadership and operational expertise play a critical role in supporting Peak Trust Company's long-term success.

Talk to Jeannie

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

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