



## Rich Wiggins

*Associate Fiduciary Officer*



Rich Wiggins is an Associate Fiduciary Officer at Peak Trust Company, bringing more than 20 years of experience in investment management, portfolio construction, and risk analysis. Rich supports fiduciary administration with a deep understanding of asset allocation, performance evaluation, and investment oversight across traditional and alternative asset classes.

Rich has worked extensively with complex portfolios, contributing to investment policy development, benchmark selection, risk governance, and manager evaluation. His experience includes analyzing portfolio risk and liquidity, supporting investment committees, and collaborating with advisors and other professionals to advance long term planning objectives.

In addition to his fiduciary and investment expertise, Rich is a respected industry thought leader and professional writer. He has served in editorial and advisory roles for investment publications and organizations, contributed widely read research and commentary on markets and portfolio strategy, and participated in the development and grading of professional credentialing exams.

Rich holds a Bachelor of Business Administration from the University of Michigan Ross School of Business and a Master of Science in Finance from the University of Colorado. He is both a Chartered Financial Analyst (CFA) and a Chartered Alternative Investment Analyst (CAIA).

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### Talk to Rich

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

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