

Alta Trust Company Joins The Wealth Engineering Expert Sourcing Consortium

The WE Family of Companies is pleased to announce the inclusion of Alta Trust Company as an exclusive core component of its Expert Sourcing Consortium

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December 12, 2024 – The Wealth Engineering Family of Companies (WE) is pleased to announce the inclusion of Alta Trust Company as an exclusive core component of its Expert Sourcing Consortium; synchronizing with our other expert sourcing firms and our elastic infrastructures – FusionPowered Wealth Advisory and OpenOption Practice Engineering Dashboards.



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“We are excited to include the comprehensive portfolio of South Dakota trust services offered by Alta Trust Company” said WE Founder and CEO Nick Gregory, ChWE. “The Alta team’s expertise and proven approach will help “wealth advisors” provide their clients much needed private trust services on a white label basis. Alta Trust services will be offered to our universe of 2,150+ TopTier wealth management firms and multi-family offices, as well as CPA and broker-dealer firms that my organization consults with. Alta Trust will further enhance our efforts in transforming firms into a true total wealth management dimension; modernizing their practice ecosystems at scale to deepen organic growth and enhance profitability and value.”

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We appreciate the warm welcome into The Wealth Engineering Expert Sourcing Consortium and channeling our expertise toward their impressive universe of wealth management firms”

Adam Ponder

The WE Fusion Powered Wealth Advisory model transforms firms from “AUM/Product Providers” to “Holistic Fee-Based/AUM Solutions Providers,” while streamlining technology and bridging “HNW Client Offering Blindspots”.

“We appreciate the warm welcome into The Wealth Engineering Expert Sourcing Consortium and channeling our expertise toward their impressive universe of wealth management firms,” said Adam Ponder, CEO of Alta Trust. “Wealth managers are increasingly looking for ways to brand, position and differentiate themselves while showcasing the value they provide,” said Ponder. “Providing trust administration services within their “client offering” can be quite powerful. Our services provide an immense value to their clients while increasing the perpetual value and success of wealth managers.”. Alta allows advisors to recalibrate their practice ecosystems more efficiently. They can finally master the trust administration maze.”

Alta Trust’s CEO, Adam Ponder will be a featured presenter at The Wealth Engineering Institute’s Upcoming Wealth Advisory FusionPower Conference, to be held in Orlando, Fla., February 10-12. To learn more about the event, you can visit: weconferences.com

With this announcement Alta Trust Company joins the Wealth Engineering arsenal of best-in-class expert sourcing firms that provide a vast array of services and products to Wealth Engineering’s network of wealth management firms across the nation. The result is the fusion of advanced knowledge, experience, services, products and technology with sound engineering principles to create a synchronized hub for family and business wealth building.

About Alta Trust Company

Alta Trust is a trust services firm founded and Chartered in South Dakota in 2008 to focus on serving advisors and the families and enterprises they serve. We work with our clients’ accountants, estate planning attorneys, financial advisors, and others to ensure that each family’s needs are met and that their values extend across generations. We achieve that with a team of dedicated professionals who are dedicated to dealing with blended families, aging adults and other modern dynamics. We have the experience to help clients and their advisors through difficult scenarios towards the goal of continued legacy. At Alta Trust we know advisers want to help their clients with estate planning that honors their legacies. We also know advisers often struggle to find a trust company who is a true partner, not a competitor. We provide adviser’s clients unmatched trust options along with no state income tax and exceptional trust protection. For more information visit TrustAlta.com

About The Wealth Engineering Family of Companies

Born 28+ years ago, the Wealth Engineering (WE) Family of Companies has evolved through an ecosystem of six affiliated firms to develop an elastic infrastructure for managing total wealth. It includes high-touch wealth advisory harmonized with high-touch wealth tech partner firms. WE provides a multi-disciplinary suite of consulting services for wealth management, multi-family offices, accounting, investment and insurance advisors nationally. WE fuses sound engineering principles with advanced knowledge, services, products and tech to create a synchronized hub for “client wealth building.” WE helps advisors grow organically by deploying new tactics and strategies as they evolve from “AUM/Product Providers” to “Holistic Fee-Based Solutions Providers”. WE helps rejuvenate the contours of advisory practices through coaching, training,

marketing and HNW case design – FusionPowered Wealth Advisory and OpenOption Practice Engineering. WE is also the governing body and grantor of the professional designations – Chartered Wealth Engineer (ChWE) and Chartered Family Office Advisor (ChFOA).
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