NDTCO Launches New Client Platform to Deliver Greater Clarity, Control, and Connection for Alternative Asset Investors

A modern digital experience built to enhance — not replace — the human service that defines the NDTCO difference.

BOULDER, CO, UNITED STATES, June 1, 2026 /EINPresswire.com/ -- New Direction Trust Company (NDTCO), a leading custodian for retirement accounts holding alternative assets, today announced the launch of its New Client Platform — a digital experience designed to give clients greater clarity into their investments, more control over their accounts, and a stronger connection to their service team.

Retirement investors are increasingly looking beyond stocks and bonds. Driven by demand for greater portfolio resilience, IRAs holding alternative assets — private equity, real estate, precious metals, and private debt — have seen significant growth as investors seek to diversify across asset classes. Managing that complexity, however, has historically required navigating a fragmented, paperwork-heavy experience that hasn't kept pace with investor expectations.

Built around three core principles — Total Clarity, Effortless Control, and Personal Connection — the platform reflects NDTCO's belief that the right technology should make relationship-based service feel more personal, not less.

"Alternative asset investors have been underserved for too long — fragmented systems, slow paperwork, and no real visibility into their portfolios. We saw that gap and decided to close it. This platform is NDTCO's commitment to giving alternative asset investors the modern experience they deserve," said Kevin Dodson, CEO of New Direction Trust Company.

The Three Core Principles Feature Highlights
Total Clarity — One dashboard. Every holding, valuation, and transaction, in real time. Clients finally have a complete, consolidated view of their alternative portfolio.
Effortless Control — Gone are the days of manually keying in financial data. Clients upload their documents and the platform does the rest, intelligently reading and auto-populating the required fields so transactions move faster and with fewer errors.
Personal Connection — Too often, digital platforms replace human relationships with chatbots and ticket queues. NDTCO built something different. Clients can reach their service team directly through the platform and share their screen for hands-on guidance — making every interaction

faster, more accurate, and genuinely personal.

The platform consolidates account visibility, transactions, documents, and communication into one intuitive environment — removing friction while giving the Account Manager and Client relationship room to grow.

This launch is the latest step in NDTCO's long-term commitment to serving alternative asset investors at the highest level. With more than 20 years of experience, over 90,000 clients served, and more than $5 billion in alternative assets under custody, NDTCO has the depth of expertise to know what investors actually need — and the commitment to build it. The New Client Platform is the result: a modern experience worthy of the relationships NDTCO has spent decades earning.

The New Client Platform is now available to NDTCO clients. To learn more, visit ndtco.com/alternative-portfolio.

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