Ezra Group Welcomes Sharon Watson as Executive in Residence and Trust/Fiduciary Domain Lead

Sharon Watson joins Ezra Group to lead its Trust & Fiduciary services, advising clients on strategy, technology modernization, operations, and AI.

CHERRY HILL, NJ, UNITED STATES, September 29, 2026 /EINPresswire.com/ -- Ezra Group, a WealthTech-focused technology consulting firm, today announced that Sharon Watson has joined the firm as Executive in Residence (EIR) and Trust/Fiduciary Domain Lead. In this role, Watson will advise Ezra Group clients on trust and fiduciary matters and help the firm build a differentiated Trust & Fiduciary Services capability.

"We are thrilled to welcome Sharon as an Executive in Residence at Ezra Group. Her extensive experience leading wealth management and trust services will provide a valuable industry perspective that complements our technology, data and consulting capabilities," said Craig Iskowitz, CEO of Ezra Group.

Sharon Watson, CFP®, is a seasoned financial services executive with a track record of leading high-performing teams and driving strategic initiatives across wealth management. As Senior Vice President of Wealth Management & Trust Services at First Command Financial Planning, she led a team of credentialed professionals overseeing high net worth client services, chaired the Board Trust Investment Committee, and represented Wealth Management at the Board of Directors level.

She also directed product strategy for First Command's Asset Management Solutions program and served as a strategic consultant to a 400+ advisor field force across the US and Europe, with additional expertise spanning vendor management, digital experience strategy, and investment oversight. Earlier in her career, she held leadership roles in non-profit financial management and senior trust and brokerage oversight at Los Alamos National Bank. Sharon holds the CFP® designation and is an honors graduate of the Stonier Graduate School of Banking.

A Growing Focus on Trust and Fiduciary Services
Ezra Group is seeing increased demand from organizations that operate trust and fiduciary businesses, including trust companies and financial institutions where trust businesses coexist with RIAs, broker-dealers, retirement businesses and other wealth management operations. These organizations face challenges that increasingly cross traditional functional boundaries,

from modernizing legacy trust technology to applying automation and AI to trust administration to building a more integrated high-net-worth client experience.

In the role, Watson will advise select Ezra Group clients on trust and fiduciary strategy, operating models and technology, serving as the firm's senior trust and fiduciary advisor on client engagements. She will also lead Ezra Group's Trust & Fiduciary services offering, shaping the firm's service across trust strategy and operating models, technology modernization, operations and process optimization, automation and AI, and fiduciary service models.

Beyond client and capability work, Watson will help amplify Ezra Group's point of view on the future of trust and fiduciary services through podcasts, articles, research and industry events, and will connect the firm to the broader trust and wealth management marketplace, bringing her market perspective and relationships into Ezra Group's network.

"I'm excited to join Ezra Group at a moment when trust and fiduciary organizations are rethinking their operating models and technology. This role gives me the platform to stay close to the industry while helping build something new," said Watson.

About Ezra Group
Ezra Group is a WealthTech and technology consulting firm based in Cherry Hill, New Jersey, serving wealth management, trust and fiduciary organizations with expertise in technology, operations, data, integrations, automation, AI, vendor evaluation and transformation.

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