

About Donn

Donn has been with Peak Trust Company as Chief Compliance Officer since 2011 and the financial services industry since 1981. Donn brings broad experience with IT back-office systems integration, transaction monitoring, and business process engineering to the CCO role. His primary responsibility is focused on the continuous development and oversight of the Company's regulatory and fiduciary best practices compliance program, reporting directly to the Board of Directors' Audit Committee.

Before joining Peak Trust Company, Donn served as CIO for a Pacific Northwest brokerage firm. He was an entrepreneur founding his own systems integration firm providing document imaging, CRM, and business intelligence programs to financial services, medical, and government businesses. He is a key member of the Fiduciary Investment Management Association (FIRMA) where he leads a peer group roundtable and delivers training sessions at annual FIRMA conferences. Donn holds the Certified Fiduciary Risk Investment Specialist (CFIRS) designation from Cannon Financial School.



DONN LASSILA, CFIRS
Chief Compliance Officer

Talk to Donn

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

 (888) 544-6775

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About Peak Trust Company

Peak Trust Company serves estate planners looking for a professional trustee, who want **reliable and accessible expertise** to help them with their client's complex trust plans.

Peak Trust Company offers the **experience and sophistication** to help you quickly and accurately establish trusts, backed by easy-to-use ongoing trust administration.

Unlike traditional banks and trust companies, at Peak Trust Company, your trust is our core business. This enables us to provide a highly **customized delivery process** tailored to your specific needs and an unbundled service structure; providing everything you need but only what you want.

Peak Trust Company serves as trustee of trusts nationwide, specializing in administration for trusts pursuant to Alaska or Nevada law.