



Anna Esoda, CFA, Joins Sage Mountain as Senior Portfolio Manager

Esoda's hire underscores the firm's commitment to expanding its bespoke client offerings.



Photo: Anna Esoda, CFA, Senior Portfolio Manager at Sage Mountain

Atlanta, GA (March 8, 2022) — Sage Mountain Advisors LLC (Sage Mountain), an all-inclusive, independent wealth management firm, today announced it has brought on Anna Esoda, CFA, as Senior Portfolio Manager. Esoda, who hails from SignatureFD where she onboarded, constructed, and managed client portfolios, brings over a decade of experience to Sage Mountain.

"We're thrilled to welcome Anna Esoda to our Sage Mountain team," said Scott Neu, Co-Founder and CEO of Sage Mountain. "Since we don't do cookie cutter portfolios, Anna's detailed attention for monitoring, analyzing, and reconfiguring complex financial situations is essential for our clients' needs."

In this role, Esoda's responsibilities include onboarding and customizing client portfolios, recommending allocations, and guiding sophisticated transitions. "Given the firm's specialty in alternative investments, this individualized and comprehensive view is indispensable," said Neu.

"I am very excited to join the Sage Mountain team, and to serve as a reliable and transparent partner to our clients and their families at all the key moments in their lives, especially during turbulent times as we see now," said Esoda. "I feel honored that our client partners put so much trust in our guidance."

Esoda studied undergraduate Business Administration at the University of North Carolina's Kenan-Flagler Business School, and she is a CFA charterholder. She currently resides in Atlanta, Georgia with her husband and their two dogs.

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About Sage Mountain Advisors

Sage Mountain Advisors LLC is an all-inclusive wealth management firm and alternative investment community, providing concierge-level service dedicated to protecting and growing a family's net worth for this generation and the next. Sage Mountain is a fee-only, 100% independent and employee-owned boutique firm with Wall Street roots. It has grown to advise on over \$2.5 billion in assets for a select group of high-net-worth families nationwide. For additional information, please visit sagemountainadvisors.com.

Disclosure

Sage Mountain Advisors, LLC (SMA) is an investment adviser registered with the U.S. Securities and Exchange Commission. Registration does not imply a certain level of skill or training. More information about SMA's investment advisory services and fees can be found in its Form ADV Part 2, which is available upon request.

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