SAGE MOUNTAIN

Sage Mountain Accelerates Team Growth to Elevate Client Experience

The boutique RIA increased headcount by over 30% in the past six months, providing white-glove service to its client base in addition to an all-inclusive wealth management and alternative investing offering.

Atlanta, GA (April 5, 2022) — Sage Mountain Advisors LLC (Sage Mountain), a leading, all-inclusive, independent wealth management firm, announced today it has expanded its team by over 30% in the past six months, while elevating senior roles in order to enhance the level of service for its select client base of entrepreneurs and high-net-worth families. Sage Mountain has grown to advise on over $2.5 billion in assets in the past four years by taking a holistic approach beyond traditional wealth management to include a specialty in community-sourced, alternative investing.

“Our clients are accustomed to¬¬, and expect, top-quality care and attention in all areas of their lives,” said Scott Neu, Co-Founder and CEO, Sage Mountain. “Our concierge-level client experience was inspired by the world of luxury hospitality and wellness so that our valued clients can feel assured that not only will their needs be met at our firm but that they’ll be anticipated. We’ve gotten to know each family so well that we can help guide them, and their future generations, with financial analysis, planning, and investment support before they even have to ask the question.”

Looking Ahead to Clients’ Future

In an increasingly complex world, it is essential that entrepreneurs and high-net-worth families work with an experienced team that understands the unique challenges they face and can work with them to build a comprehensive plan to help achieve their goals. Sage Mountain has taken a 360-degree approach beyond standard investment options, offering advice on trust and estate planning, tax strategies, philanthropic planning, and next generation education.

Looking Ahead with Team Growth

Sage Mountain has hired new roles across wealth advisement, portfolio management, client service, and reporting, along with elevating Sage Mountain’s Co-Founder and Chief Investment Officer, Tony Cox, to President. Collectively, the team brings decades of expertise and experience from Wall Street firms in a structure predicated on creativity, flexibility, and independence.

Looking Ahead to New Models of Investment

With the uncertainty around volatile public markets, trends in high-growth companies remaining private longer, continued low interest rates, and a nearly 50% increase in global merger-and-acquisition activity in 2021 (PitchBook Data, Inc., 2021), Sage Mountain has expanded its approach and priority to alternative investments. By growing the network of clients turned investment partners and internal advisors, the firm has been able to create a unique model for sourcing, evaluating, and acting on deals that may otherwise be overlooked or not available to most investors.

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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.

Media Contact
Whitney Imeraj
T: 404.795.8361
E: wimeraj@sage-mtn.com