DUNHAM TRUST COMPANY

Dunham Trust Company Leadership Team

For you. For them. For generations to come.

Daniel Sands, CFP®
Trust Portfolio Manager

Daniel Sands is the Trust Portfolio Manager for Dunham Trust Company (DTC). He is responsible for the day-to-day management of portfolio assets for DTC and works in concert with the Dunham & Associates Investment Counsel (DAIC) Analyst team. Daniel provides wealth management, portfolio implementation, and investment oversight using a consultative approach incorporating existing financial advisors and DTC Trust Officers. He reviews and analyzes investment programs, asset allocations, and investment goals to help achieve desired results for all stakeholders.

Daniel brings two and half decades of experience in the financial services industry to DTC. He started his career with Trust Company of America in 1995, where he gained knowledge of custodial trust services, and helped pioneer the first Internet-based model trading software for institutional investors in the industry. In 2000, Daniel changed over to the independent Registered Investment Advisory and Broker/Dealer side of the business. From time spent as Director of Operations to Managing Partner, and Wealth Manager to Financial Planner, Daniel is intimately familiar with all aspects of managing client relationships and running financial advisory practices.

Daniel is a CERTIFIED FINANCIAL PLANNER professional. He completed his CFP® Board of Standards education program at University of California, Irvine and graduated Magna Cum Laude from Cal Poly, Pomona where he earned a B.S. in Business Administration and majored in Finance, Real Estate, and Law. He holds FINRA Series 7, 24, and 66 registrations. Daniel lives in Reno with Aryn, his wife, and their two boys. He is an avid outdoorsman with a passion for skiing and mountain biking. Daniel also coaches youth sports.

At a Glance

√ Trust Portfolio Manager

√ Responsible for wealth management, portfolio implementation, and investment oversight

√ Reviews and analyzes investment programs, etc. to help achieve desired results for shareholders

√ Received a B.S. in Business Administration from Cal Poly, Pomona

About Dunham Trust Company

Dunham Trust Company is a privately held trust company. It is licensed in the states of Nevada and Colorado and is regulated by the state of Nevada, Department of Business and Industry, Financial Institutions Division. Dunham Trust opened in 1999 with the core belief that cultivating highly personal service would make a positive difference in providing exceptional trust administration services. Whether we are working with a family running a business or assisting a wealth manager, building lasting relationships has been and continues to be our key to sustained success. Our senior trust officers interact directly with you so you can benefit from their extensive trust administration, operations and investment management expertise. We look forward to working together with you to build a legacy that lasts for generations.