



Alex Potts

Chairman, Advisor Services
Loring Ward

Alex Potts doesn't just lead a company that helps Financial Advisors. Ever since he was 13 helping his single mom balance her checkbook, he has considered it his mission to help individuals and families reach their financial goals.

Alex's passion for creating a better wealth experience for advisors and their clients is reflected throughout Loring Ward, where he has served as President and CEO since 2009. He also serves as President and CEO of the SA Funds – Investment Trust.

Previously, Alex was the Chief Operating Officer of LWI Financial Inc. He has also served as Chief Executive Officer of RNP Advisory Services, Inc., a registered investment advisory firm.

Alex started the SA Funds – Investment Trust and founded Loring Ward Securities Inc. (formerly Assante Capital Management Inc.). In addition, he served as Executive Vice President and General Manager of LWI Financial Inc. (formerly Assante Asset Management, Inc.).

Alex graduated from Santa Clara University with a Bachelor of Science in Economics. He holds General Securities (Series 7), State Law (Series 63) Investment Advisor (Series 65) and General Securities Principal (Series 24) licenses.

He and his wife Karen love traveling, running, collecting art and spending time with their grown son and daughter.