

We sat down with Julie Newman, Partner and Managing Director, to discuss her current role at Altera, her 12 years of experience in the industry, and why she feels Altera's team is its most differential factor.

Q: What is your role at Altera?

I oversee operations for the entire company including fund management, reporting, investor relations, systems, and compliance. From day one, I worked with the team to implement processes and strategies to keep things moving forward.

Q: What led you to Altera?

After 10 years with the same company, I needed a challenge and new perspective. I have known Mitch since high school and when I began my job search, he and I connected. I interviewed with CIA first, and the same day got a call from Altera wanting to interview me for an investor relations position. The position checked all my requirements and the new challenge excited me. Now almost four years have passed, and it blows my mind every day what we have built.

Q: What do you think differentiates Altera from other firms?

We have a rockstar team and I am not exaggerating when I say that at all! Everyone brings their best to the table every day and we encourage growth, employee development, and an entrepreneurial spirit. We are honest with each other. We truly care about our investors and the advisors that we work with.

Q: Recount a notable achievement, experience, or your favorite initiative so far at Altera.

There have been so many to be honest, from growing our operations team to successfully integrating with the major custodial platforms. It has been an incredible experience watching the momentum of the firm. When I started at the firm's inception back in 2018, we had \$4M in AUM, now we are crossing over the nearly \$250M AUM marker.

“We have a rockstar team...we encourage growth, employee development, and an entrepreneurial spirit.”

Q: What is something you would like someone to know about you?

The most valuable asset to me is trust. I believe in doing the right thing, even when nobody is watching.



Julie Newman
Partner, Managing Director

Q: Describe Altera in 3 words.

Passionate. Creative. Dynamic.

Q: Tell us more about your experience in the industry.

I started as an admin in 2011 and was quickly moved to client services. I loved working with clients and advisors from day one and it came very naturally. In time, I became the Director of Operations and I have been in operations within the industry now for almost 12 years. I have a passion for “making the machine” work and implementing processes that make everyone's jobs easier and keep investors happy.

Q: What's the best piece of career advice you ever received?

“Believe that something is growing, even when you can't see the growth. Trust the process.” These words were shared with me by a professional coach, and I keep them written on the whiteboard in my home office. They helped me persevere through building a new company and continuing to push forward during the struggles of COVID. Building anything is difficult, and sometimes the progress is slow and hard to see. This reminds me that you can do anything you set your mind to.

Q: What do you enjoy doing outside of work?

Snuggling my pup, paddleboarding, hiking, traveling, volunteering, coaching other women in career development, and reading by the pool.