



Bruce L. Swanson, PhD

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Professional:

- Senior Managing Director, Principal, Senior Vice President and Chief Investment Officer, Sentinel Trust Company, LBA (1998–present) – *Responsible for all client investment areas and activities; first dedicated investment professional at Sentinel, was responsible for creation of investment structure and group optimized to serve the needs of ultra-affluent families; manages all-cap core domestic equity portfolios for clients; selects all external managers and funds for other risk asset classes; manages niche international micro-cap value strategy; built asset allocation models; and makes all tactical allocation decisions*
- Director of Non-Real Estate Investments, Hines (Gerald D.) Interests, Houston, Texas (1987–1998) – *First dedicated family office employee; was responsible for investing assets outside of this family’s high-profile core real estate business; invested tactically (and directly) in numerous asset classes, both traditional and alternative, including a full range of credit, international, derivative and commodity based strategies*
- Director of Investments, Taubman Investment Co., Bloomfield Hills, Michigan (1985-1987)

Academic:

- Rice University (1992) – *Position of Visiting Lecturer in Economics*
- Harvard University, PhD in Business Economics (1976–1986) – *Joint degree of the Harvard University Graduate Schools of Arts and Sciences and Business Administration*
- Williams College, B.A. in Economics (1973–1976) – Phi Beta Kappa

Community:

- The Fay School – Former Trustee, Treasurer and Chairman of Finance and Search Committees
- Houston Committee on Foreign Relations
- Harvard University Houston Schools Committee (interviewer for admissions)

Presentations:

- “Getting Started in Private Equity” – Opal Investment Forum
- “Confessions of a Mean-Reversionist” – Rice University, Houston, TX, Center for Computational Finance and Economic Systems
- “A Family Office Perspective on Venture Capital Investing” – Mohr Davidow annual meeting
- “Real Estate Investment Opportunities: Putting the Pieces Together” – Marcus Evans Private Wealth Management Summit

Publications:

- “Investment Themes for Year 2000 and Beyond” (February, 2000)
- “Sentinel Horizons” (January, 2001)
- “Economic Recovery Plays OK, U.S. Equities Not the Way” (February, 2002)
- “And Then There was One” (February, 2003)
- “The New Carry Trade: Let’s Make a Deal” (March, 2005)
- “New Age Economics: Do You Believe?” (March, 2006)
- “Capital Market Assets: Dead Men Walking?” (March, 2008)
- “The Bubble Years: Were They Just a Dream, Dr. Greenspan?” (April, 2009)
- “Global Warming-Not Just Yet” (April, 2010)