



**Tri T Nguyen, CFA, CAIA**

Assistant Vice President and  
Senior Investment Analyst

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**Professional:**

- Assistant Vice President and Senior Investment Analyst, Sentinel Trust Company (2004 – present) *Responsible for primarily equity research; fundamental analysis on individual equities and a broad range of economic sectors. Assists in portfolio management, trade execution and development of junior investment analyst*
- Tax Analyst, ExxonMobil (2003) *Responsible for filing corporate state tax return for the various ExxonMobil entities, including follow-up research in responses to tax audits*
- International Tax Analyst, PricewaterHouseCoopers (2003) *Prepared individual tax returns and tax equalizations for expatriates and foreign nationals*
- Financial Analyst, Howard Frazier Barker Elliott (2002 – 2003) *Researched respective industries used in firm valuation*
- Financial Reporting Analyst, AIM Management Group (2002, presently, Invesco, Ltd.) *Generated and proofed financial statements for the AIM mutual funds*

**Certification:**

- Chartered Financial Analyst (2009)
- Chartered Alternative Investment Analyst (2012)

**Professional Organizations:**

- CFA Society of Houston (2004 – present)
- CFA Institute (2004 – present)
- CAIA Association (2012 – present)

**Education:**

- University of Houston, BBA in Finance (2004)



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