



Eric Atwood, CFP, CTFA

Trust Officer

Main: 713.529.3729

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Professional:

- Trust Officer, Sentinel Trust Company (2007–present) – *Manages relationships and account operations for select accounts. Assists clients regarding activity in trust accounts to ensure overall level of satisfaction with service. Recommends, documents, and monitors routines that ensures accuracy and enhances efficiency in administration and client service.*
- Trust Officer, Bank of America, Tampa, FL/Houston, TX (2000–2007) – *Responsibilities included assisting a team of Trust Officers with the day to day administration of their Investment Management, Trust and Foundation accounts for a large publicly traded national banking institution. Served as an additional point of contact to clients and/or as a backup for Trust Officer.*

Certifications:

- Certified Trust and Financial Advisor (2004)
- Certified Financial Planner (2006)

Professional Organizations:

- Houston Estate and Financial Forum
- American Bankers Association

Education:

- Campbell University, BBA (2000)



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