



Anthony J. DeToto, Sr.

Principal and Senior
Relationship Officer

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Professional:

- Senior Vice President, Sentinel Trust Company, LBA (2007–present) – *Responsible for leading selected client relationships; responsible for assuring client families, prospective clients and strategic relationships have access to the full range of customized solutions provided by the Firm*
- Vice President, Wealth Management Advisor, Merrill Lynch (2001–2007) – *Served in the private bank and investment groups focusing on entrepreneurs and venture capitalists*
- Regional Vice President, Pragmatech & PRT Group (1997–2001)
- Broker, Daniel James & Wright Company Insurance (1993–1997)
- Officer, United States Army (1991–1997)

Certification:

- Series 6, 7, 63 & 66
- Wealth Management Advisor (Wharton)
- International Wealth Management Advisor (Wharton)

Education:

- United States Military Academy at West Point, BS (1991)

Community Service:

- Cristo Rey Network
- Sovereign Order of St. John
- Best Buddies
- West Point Society – Board member, Past President
- Junior Achievement
- Legatus

Recent Professional Presentations:

- “Conflicts of Interest – Eliminate or Illuminate?” – Institute for Private Investors
- “Raising Financially Literate Children” – The Estate Forum
- “Generation Next- Communication about Money” – Private Family Briefing Houston
- “Financial Literacy for Children” – Private Family Briefing Dallas
- “Financially Literate Parents” – Private Family Briefing San Francisco



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