



**Dennis A. Montz,**  
**CFA, CAIA**

Vice President – Private  
Investments

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**Professional:**

- Vice President – Private Investments, Sentinel Trust Company, LBA (2007–present) – *Sources, conducts due diligence, analyzes and monitors four proprietary private equity funds of funds in conjunction with external specialized consultants; oversees limited partnership investments in venture capital, corporate finance and real estate funds; analyzes other private investment opportunities for clients*
- Vice President of Finance/Treasury, Amedisys, Inc., Baton Rouge, LA (2006–2007) – *Directed treasury operations, maintained lender relationships and lead investor relations communications for leading public home health care company*
- Senior Analyst, AIG Global Investment Group / AIG Financial Services, New York (1999–2006) – *Reviewed private equity fund investment proposals and investments for AIG-sponsored private equity funds; managed \$200 million portfolio for AIG's life insurance companies*
- Investment Officer, Global Partner Ventures (1996–1998)
- Manager, Price Waterhouse LLP (1993–1995)
- Independent Consultant, International Finance Corp (1992–1993)

**Certification:**

- Chartered Alternative Investment Analyst (2011)
- Chartered Financial Analyst designation (2000)

**Professional Associations:**

- New York Society of Security Analysts (2000–present)
- Institutional Limited Partners Association (2008–present)
- CFA Society of Houston (2007–present)

**Education:**

- Tulane University, New Orleans, LA, MBA in Finance (1992)
- Georgetown University, Washington, D.C., BS in Foreign Service (1989)

**Board Memberships:**

- Tulane Association of Business Alumni (2006–2008)
- KK Interconnect (Global Partner Ventures Portfolio Company) (1996–1999)

**Panelist:**

- “PE Fundraising from Family Offices & Wealthy Individuals” – Master Class Capital Roundtable



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