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Professional:

- Senior Vice President and Director of Research, Sentinel Trust Company, LBA (1999–present) – *Leads research, analysis and trading; supervises domestic equity research team; developed analytical systems for domestic equity valuation and portfolio analysis; involved in all other investment areas and decisions*
- Analyst, Global Transaction Services Group, KPMG LLP, Houston, TX (1998–1999) – *Performed analysis on publicly traded and privately held entities and securities, including fair market valuations for businesses and estates, purchase price allocations, retroactive taxing assessments, and restricted stock and discount studies*
- Financial Analyst, Houlihan Lokey Howard & Zukin, Inc., Dallas, TX (1997–1998)

Certifications:

- Chartered Financial Analyst (2002)

Professional Organizations:

- CFA Institute
- CFA Society of Houston

Education:

- University of Texas at Austin, BBA (1997)

Community Service:

- Junior League of Houston, former member



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