

Anne-Lise A. Wiegand, CPA

CHIEF FINANCIAL OFFICER, MANAGING DIRECTOR, SHAREHOLDER

Phone: 713.529.3729 | Email: awiegand@sentineltrust.com

Service Areas

Personal Touch
Specialty Assets
Fiduciary Services
Wealth Planning
Investment Services

Education

Portland State University, Post-Baccalaureate in Accounting (2009)

Oregon Bankers Association (OBA) Bank Operations School (2001)

Cornell College, BA in Anthropology & Sociology, *cum laude* (1995)

Certifications

Certified Public Accountant (2012)

Anne-Lise is responsible for Sentinel Trust's operations. Her role includes leading and overseeing the firm's internal financial systems and controls, pooled investment vehicles, investment operations, risk management, and administration of client assets and entities.

Anne-Lise's financial services career spans over twenty years. She first honed her skills in all aspects of banking processes and regulatory administration in her decade working at a community bank where she served as Controller. She developed and implemented financial systems, processes, and controls. While there, she played a key role in their successful Reg. A offering. Her prior roles also include more than a decade of planning for clients with multigenerational wealth at Sentinel Trust and Threshold Group.

Professional Background:

- Senior Vice President and Senior Relationship Officer, Sentinel Trust Company, LBA, Houston, TX (2013–2017)
  Responsibilities included leading the delivery of investment, planning, fiduciary, administrative, and family office services for a select group of Sentinel Trust clients.
- Associate Director of Wealth Planning & Advisory, Threshold Group, LLC, Portland, OR (2008–2013)
  Responsibilities included designing and delivering financial planning services and resources to all Threshold clients. Coordinated relationship teams to deliver investment advisory services, accounting and tax management, financial education, estate planning, and other financial and wealth management services to $100+ million clients. Held primary responsibility for onboarding new clients. Coordinated comprehensive enterprise-wide Executive Team compliance reviews of client relationships.
- Controller and Assistant Vice President, Albina Community Bank, Portland, OR (1998–2008)
  Responsibilities included directing the accounting functions and regulatory reporting for a growing community bank. Developed and implemented financial systems, processes, and controls that improved efficiency, data integrity, and profitability. Managed the bank's CDFI Bank Enterprise Awards program and played a key role in their successful Reg. A offering.

Professional Organizations:

- Texas State Board of Public Accountancy, Member
- Texas Society of Certified Public Accountants, Former Member

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- American Institute of Certified Public Accountants, Former Member

Community Involvement:

- Contemporary Handweavers of Houston, Board Member
- Veterans Low-Income Housing, Former Volunteer
- Homowo African Arts and Cultures, Former Board Member
- Junior Achievement, Former Volunteer

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