



## Anne-Lise A. Wiegand, CPA

CHIEF FINANCIAL OFFICER, SENIOR VICE PRESIDENT, SHAREHOLDER

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### 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  
(1995)

### Certifications

Certified Public Accountant  
(2012)

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

Anne-Lise worked at a community bank for ten years 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.

Anne-Lise remains active in several Memorial Day, Tax Day, and Hurricane Harvey recovery efforts here, in Houston.

### Professional Background:

- Senior Vice President and Senior Relationship Officer, Sentinel Trust Company, LBA, Houston, TX (2013–2017) – *Led the delivery of investment, planning, fiduciary, administrative, and family office services to a select group of Sentinel Trust clients.*
- Associate Director of Wealth Planning & Advisory, Threshold Group, LLC, Portland, OR (2008–2013) – *Designed and delivered 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) – *Directed 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, Member
- American Institute of Certified Public Accountants, Member
- Oregon Board of Accountancy, Member
- Texas Bankers Association's Trust School Advisory Board, Board Member

**Community Involvement:**

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