



B. Beth Raza, MBA

ACCOUNTING MANAGER, VICE PRESIDENT
Houston

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Service Areas

Personal Touch

Education

Texas A&M University, MBA
(2019)

University of Houston –
Downtown, BA in Business
Communication, *cum laude*
(2014)

At Sentinel Trust, Beth works closely with the Chief Financial Officer to support the development and execution of accounting and audit-related projects, leading to scalability and automation in and across the entirety of the Firm. She monitors and confirms financial condition through conducting audits and interfacing directly with examiners, auditors, and accountants. She also guides financial decisions by establishing, monitoring, and enforcing policies and procedures to ensure and optimize corporate asset protection.

Beth has volunteered across several non-profit organizations that focus on serving underprivileged communities and providing disaster relief on a global level. In addition, Beth is active with her undergraduate and graduate school alumni networks serving the community.

Professional Experience:

- Manager of Investments & Financial Analysis, Carriage Services Investment Advisors, Houston, TX (2018–2023)
Responsibilities included leading the department of investments to assist with asset management, managing all financial operating activities, leading financial forecast efforts (including designing and maintaining complex models, conducting analyses, and monitoring trends), coordinating the audit of the fund and assisting in generating financial and trial balance statements, creating capital progression reports, and preparing quarterly analysis reporting packages for the board and the executive team.
- Senior Financial Reporting Analyst, Cosentino North America, Sugar Land, TX (2015–2018)
Responsibilities included compiling, creating, and maintaining various centralized reports, dashboards, and databases, providing reporting and analysis of the results of the division's performance against internal benchmarks, supporting the month-end close process by working with Accounting, Finance, and Operations to explain variances to budget and forecast, identify trends, and maintaining responsibility for the day-to-day general ledger accounting and reconciliation.

- Financial Operations and Compliance Analyst, LTD Financial Services, L.P, Houston, TX (2012–2015)

Responsibilities included acting as key internal/external contact for escalated inquiries pertaining to client and management escalations, coordinating with internal departments to ensure all necessary data is available to provide accurate delivers while managing all aspects of client projects to ensure deadlines were met, preparing quality reports by collecting, analyzing, and summarizing information and trends, and processing customer and account documents to review data for deficiencies and to resolve discrepancies.

Professional Organizations:

- The Fiduciary and Investment Risk Management Association (FIRMA), Member
- Texas Wall Street Women, Member

Community Involvement:

- Memorial Park Conservancy, Board Committee Member
- Parent Teacher Organization, Houston area school, Member
- Helping Hands Relief and Development, Volunteer
- PCRF – Houston Chapter. Volunteer
- An-Nisa Houston, Volunteer
- American Red Cross, Volunteer
- City Wide Club, Former Volunteer
- The Beacon, Former Volunteer