



Bruce L. Swanson, PhD

CHIEF INVESTMENT OFFICER, SENIOR MANAGING DIRECTOR, SHAREHOLDER

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Service Areas

- Public Equities
- Hedge Funds
- Private Equity
- Fixed Income
- Personal Touch
- Investment Services

Education

Harvard University, PhD in Business Economics, Joint degree of the Harvard University Graduate Schools of Arts and Sciences and Harvard Business School (1986)

Williams College, BA in Economics (1976), Phi Beta Kappa

Bruce is responsible for investment strategy at Sentinel Trust, overseeing teams responsible for all asset classes and making tactical allocation decisions across all portfolios. As the firm's first dedicated investment professional, he created the investment platform around the unique needs of wealthy families.

He has a special interest in real estate and wrote his doctoral dissertation on Real Estate Investment Trusts. Prior to joining Sentinel Trust, he worked with several real estate development families to diversify their holdings.

Bruce has over thirty years of experience investing on behalf of wealthy families. He speaks to family office and academic audiences, including Rice University and the Stanford Graduate School of Business.

Professional Background:

- Director of Non-Real Estate Investments, Hines (Gerald D.) Interests, Houston, TX (1987–1998) – *First dedicated family office employee. Was responsible for investing assets outside of this family's high-profile core real estate business. Invested tactically (and directly) in numerous asset classes, both traditional and alternative, including a full range of credit, international, derivative, and commodity based strategies.*
- Director of Investments, Taubman Investment Co., Bloomfield Hills, MI (1985–1987)

Community Involvement:

- The Fay School, Former Trustee, Treasurer and Chairman of Finance and Search Committees
- Houston Committee on Foreign Relations, Member
- Harvard University Houston Schools Committee, Interviewer for admissions

Talks:

- “Getting Started in Private Equity” – Opal Investment Forum
- “Confessions of a Mean-Reversionist” – Rice University, Center for Computational Finance and Economic Systems
- “A Family Office Perspective on Venture Capital Investing” – Mohr Davidow Annual Meeting

- “Real Estate Investment Opportunities: Putting the Pieces Together” – Marcus Evans Private Wealth Management Summit

Publications:

- “Global Warming-Not Just Yet”
- “The Bubble Years: Were They Just a Dream, Dr. Greenspan?”
- “Capital Market Assets: Dead Men Walking?”
- “New Age Economics: Do You Believe?”
- “The New Carry Trade: Let’s Make a Deal”
- “And Then There was One”
- “Economic Recovery Plays OK, U.S. Equities Not the Way”
- “Sentinel Horizons”
- “Investment Themes for Year 2000 and Beyond”