



Bruce L. Swanson, PhD

OF COUNSEL, SHAREHOLDER

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Service Areas

Public Equities

Hedge Funds

Private Equity

Fixed Income

Personal Touch

Investment Services

Bruce is Of Counsel to Sentinel Trust and provides ad hoc investment consulting advice.

Bruce was the firm's first dedicated investment professional and, after building the firm's institutional-quality investment platform, led Sentinel Trust's investment strategy. Prior to joining Sentinel Trust, Bruce worked with several families involved in real estate development to diversify their holdings. Bruce has a special interest in real estate; he wrote his doctoral dissertation on Real Estate Investment Trusts.

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

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, *phi beta kappa* (1976)

Professional Background:

- Senior Managing Director and Chief Investment Officer, Sentinel Trust Company, LBA, Houston, TX (1998–2019)
Responsibilities included investment strategy by including overseeing teams responsible for all asset classes, making tactical allocation decisions across all portfolios, and creating an investment platform around the unique needs of wealthy families.
- Director of Non-Real Estate Investments, Hines (Gerald D.) Interests, Houston, TX (1987–1998)
First dedicated family office employee. Responsibilities included 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
- The Kiwanis Foundation of Houston, Board Member and Investment Committee Chair

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”