



# D. Fort Flowers, Jr., CFA®

EXECUTIVE CHAIRMAN, SHAREHOLDER

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## Service Areas

- Public Equities
- Family Governance and Education
- Hedge Funds
- Private Equity
- Fixed Income
- Philanthropic Services
- Personal Touch
- Specialty Assets
- Fiduciary Services
- Wealth Planning
- Investment Services

## Education

- Massachusetts Institute of Technology, MS in Mechanical Engineering (1985)
- Georgia Institute of Technology, BS in Mechanical Engineering (1983)

## Certifications

- CFA® charterholder, CFA Institute (1992)

Fort founded Sentinel Trust in 1997 as the successor to both the Fruehauf and the Flowers Families' single-family offices. Since then, Sentinel Trust has grown to serve families nationwide with the same standards for investments and service set for the founding families. Fort currently serves as Executive Chairman of the Board. He also remains very active in the business and with client relationships, where his skills and knowledge are additive.

He has served on the boards of multiple private and public businesses in industries ranging from engineering and manufacturing to banking and mining. Fort has spoken extensively on family businesses, succession, and governance.

He is active in the community and served as a trustee of St. John's School, the Texas Presbyterian Foundation, and the Presbyterian Church (USA) Foundation, Inc. He has been the chair of several boards of directors, including the board of Interfaith Ministries for Greater Houston, the Texas Regional Board for the MIT Corporation Development Committee, and the Investment Committee of the Georgia Tech Foundation. Fort has also previously served as the President of the Petroleum Club of Houston.

## Professional Background:

- Trustee/Portfolio Manager, Flowers Family Trusts, Houston, TX (1987–1997)
- Design Engineer, Schlumberger, Houston, TX (1985–1987)

## Professional Organizations:

- CFA Society of Houston, Member

## Outside Boards:

- National Lime & Stone Company, Compensation Committee Chairman (1988–2012) – *Privately held minerals company (controlled by another family) with \$70 million in revenue.*
- New Covenant Trust Company, Vice Chairman of the Board (1999–2006) – *Nationally chartered trust company wholly owned by the Presbyterian Church.*
- Green Bank, Loan Committee Chairman (2006–2010) – *Privately held Houston bank.*
- Coastal Bancorp, Inc, Investment Banking & Compensation Committees, Audit Committee

Chairman, Loan Committee Chairman (1992–2004) – *Publicly traded Texas bank with \$3 billion of assets.*

- Ohio Bank, Loan & Trust Committees, Investment Committee Chairman, Audit Committee Chairman (1987–1998) – *Privately held bank (controlled by another family) with \$600 million in assets.*

### **Community Involvement:**

- Georgia Tech Foundation, Former Trustee and Past Investment Committee Chair
- Petroleum Club of Houston, Former President
- St John's School, Former Trustee
- MIT Corporation Development Committee, Former Texas Regional Chair
- Texas Presbyterian Foundation, Former Trustee
- Presbyterian Church (USA) Foundation, Inc., Former Trustee
- Interfaith Ministries for Greater Houston, Former Board Chair

### **Talks:**

- “Succession Planning in the Family Office” – NMS Conference
- “Family Dynamics in a Family Foundation” – Cleveland Ohio Community Foundation
- “Multi-Client Family Offices: Challenges & Best Practices” – Institute for Private Investors
- “Transitioning from a Family Office to a Multi-Family Office” – Financial Research Associates
- “Multi-Family Offices: Should You be a Client or a Founder?” – IBC USA Summit
- “Communicating the Concept of Risk to Investors” – Rice University, Center for Computational Finance and Economic Systems
- “The Family Decision-Making Dynamic” – Family Office Exchange
- “Intelligent Use of Advisors” – Family Office Symposium
- “Wealth Sustainability Across Generations” – Family Office Exchange
- “Wealth Sustainability and the Family Office” – Thunderbird School of Management