



Dennis A. Montz, MBA, CFA, CAIA

DIRECTOR OF PRIVATE INVESTMENTS, MANAGING DIRECTOR, SHAREHOLDER

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Service Areas

Private Equity

Personal Touch

Investment Services

Education

Tulane University, MBA in Finance (1992)

Georgetown University, BS in Foreign Service (1989)

Certifications

Chartered Alternative Investment Analyst designation (2011)

Chartered Financial Analyst designation (2000)

Dennis manages private equity portfolios for Sentinel Trust's clients and advises on direct private investment opportunities. He sources, evaluates, and monitors strategies in private corporate finance, venture capital, real estate, and real assets in conjunction with specialized consultants.

He previously worked for the chief investment officer of AIG reviewing private equity deals and funds and as consultant for Price Waterhouse. He also worked to identify private investment opportunities in the former Soviet Union for a Defense Department-sponsored fund aiming to convert military assets and personnel into peacetime enterprises.

Dennis serves as a board member of the Institutional Limited Partners Association, a leading association for institutional partners in private equity. He is a frequent speaker on the application of private equity for wealthy families.

Professional Background:

- Vice President of Finance/Treasury, Amedisys, Inc., Baton Rouge, LA (2006–2007) –*Directed treasury operations, maintained lender relationships, and managed investor relations communications for public home health care company.*
- Senior Analyst, AIG Global Investment Group/AIG Financial Services, New York, NY (1999–2006)
- Investment Officer, Global Partner Ventures, Richmond, VA (1996–1998)
- Manager, Price Waterhouse LLP, Washington, DC (1993–1995)
- Independent Consultant, International Finance Corp, Washington, DC (1992–1993)

Professional Organizations:

- CFA Society of New York, Member
- New York Society of Security Analysts, Former Member
- Institutional Limited Partners Association, Board Member and Education Committee Member
- CFA Society of Houston, Former Member

Community Involvement:

- Tulane Association of Business Alumni, Houston Chapter, President, Former Vice President, Former Treasurer
- Chartered Alternative Investment Analyst Association, Houston Chapter, Executive Committee Member
- The Institutional Real Estate Letter, Americas Spring and Fall Editorial Advisory Board Member
- Tulane Association of Business Alumni, New Orleans Chapter, Board Member
- KK Interconnect (Global Partner Ventures Portfolio Company), Board Member

Talks:

- “PE Fundraising from Family Offices & Wealthy Individuals” – Master Class, Capital Roundtable
- “Roadshow Workshop: Dos and Don’ts Advice from Top LPs” – Buyouts Texas
- “The Institutional Investor Perspective on Evolving LP-GP Relations” – IMN 10th Annual Winter Forum on Real Estate Opportunity & Private Fund Investing
- “Quick Fire Showcases” – LP Judge, SuperReturn International
- “How are Sophisticated LPs Changing their Allocation to Real Assets Within a PE Portfolio? What is the Best Way to Gain Exposure?” – SuperReturn US
- “Demystifying the Due Diligence Process” – VCJ Venture Alpha