



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:

- Institutional Limited Partners Association (ILPA), Member of the Board of Directors, ILPA Summit Committee Chair, Member of the ILPA Content Committee
- Chartered Alternative Investment Analyst Association, Houston Chapter, Executive Committee Member
- The Institutional Real Estate Letter, Americas, Spring and Fall Editorial Advisory Board Member
- CFA Society of Houston, Member

- CFA Society of New York, Member

Community Involvement:

- Tulane Association of Business Alumni, Member and Former Board Member
- Tulane Association of Business Alumni, Houston Chapter, Member, Former Chairman, Former Vice President, and Former Treasurer
- Georgetown Club of Houston, Board Member
- Georgetown University Alumni Ambassadors Program, Member

Talks:

- “Threading the Needle: Investment Decisions in 2020,” Moderator, Institutional Limited Partners Association, November 10, 2020
- “Fund Economics – Variations in Waterfalls,” Panelist, Institutional Limited Partners Association, July 27, 2020
- “Fraud in Private Equity: Can Caspersen Happen Again?” Producer/Moderator, Institutional Limited Partners Association, January 13, 2017
- “Putting ILPA Principles 3.0 Into Action: New Ideas For Stronger GP-LP Alignment,” Presenter, Institutional Limited Partners Association Conference, Chicago, IL, June 5, 2019
- “Stuck Between a Rock and a Hard Place? What to do when Faced with a GP-Led Fund Restructuring,” Panelist, Institutional Limited Partners Association Global Event, Toronto, Canada, September 11, 2018
- “Heeding the Call: The Evolving Role and Responsibility of the LPAC,” Panelist, Institutional Limited Partners Association Global Event, Washington, DC, March 19, 2019
- “How to Lose an LP in One Meeting,” Panelist, Kayo Women’s Energy Summit, Houston, TX April 19, 2019
- “The Conscious Investor,” Panelist, Texas Private Equity Summit, Houston, TX, October 10, 2019
- “Private Wealth Investments into Private Markets,” Panelist, Texas Private Equity Summit, Houston, TX, October 25, 2018
- “Demystifying the Due Diligence Process” – VCJ Venture Alpha, San Francisco, CA, October 18, 2012
- “How are Sophisticated LPs Changing their Allocation to Real Assets Within a PE Portfolio? What is the Best Way to Gain Exposure?” – SuperReturn US
- “Quick Fire Showcases” – LP Judge, SuperReturn International
- “The Institutional Investor Perspective on Evolving LP-GP Relations” – IMN 10th Annual Winter Forum on Real Estate Opportunity & Private Fund Investing
- “Roadshow Workshop: Dos and Don’ts Advice from Top LPs” – Buyouts Texas
- “PE Fundraising from Family Offices & Wealthy Individuals” – Master Class, Capital Roundtable