

Devangi D. Thakkar, CPA, MBA, CFA®

INVESTMENT PERFORMANCE AND REPORTING MANAGER, VICE PRESIDENT

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Service Areas

Personal Touch

Investment Services

Education

University of Houston – Victoria, M.B.A Dual Concentration in Finance and Accounting (2014)

Mumbai University, BS in Accounting (2006)

Certifications

CFA® charterholder, CFA Institute (2020)

Certified Public Accountant, United States (2011)

Chartered Accountant, India (2008)

Devangi leads fund and client performance reporting at Sentinel Trust. In addition, Devangi works closely with the Accounting and Operations teams to support the development of performance-related projects.

Devangi joined Sentinel Trust in 2021 with over fifteen years of experience in audit, fund accounting, fund valuations, and performance reporting experience. Prior to joining Sentinel Trust, Devangi served as a Senior Performance Analyst at a multi-national e-commerce and information technology giant. An accredited CPA not only with the American Institute of Certified Public Accountants but also with the Institute of Chartered Accountants of India, Devangi brings wide-ranging knowledge in the areas of audit, tax, financial modeling, and performance reporting.

Devangi is an active volunteer at BAPS Charities, a global non-profit organization, serving the community by volunteering in events that include Walkathons and Annual Health Fairs.

Professional Background:

- Financial Analyst II, Amazon, Houston, TX (2021)
  Responsibilities included developing and executing audit programs on Contribution Profit components; partnering with global stakeholders to develop and propose new allocation methodologies for revenues and cost; and developing and automating financial control mechanisms to ensure accountability, data quality, and accuracy.
- Senior Performance Analyst, Invesco, Houston, TX (2013–2021)
  Responsibilities included overhauling performance reporting model to calculate and analyze dollar-adjusted alpha and beta for fixed income and equity asset classes; performance reporting and presentation of board materials to influence and support strategic investment decisions; collaborating cross-functionally with product management, investments, compliance, and marketing teams to develop new reporting tools; maintaining systems and databases to ensure accuracy and integrity of static and time series data across relevant portfolios, benchmarks, and other performance data.

  Prior roles included Performance Analyst II, Senior Fund Valuations, Fund Accountant II, Fund Accountant I, and Intern.
- Assistant Manager, National Stock Exchange of India Limited, Mumbai, India (2009–2010)
  Responsibilities included conducting audits of brokers in Capital Markets, Futures & Options, and Currency Derivatives; conducting examinations and reviews of the firms' finances and operations,

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sales, underwriting, and trading practices, and providing comprehensive written and verbal reports to broker-dealer executives and senior management.

- Financial Control Intern, BNP Paribas Bank, Mumbai, India, (2008–2009)
  Responsibilities included accounting for subsidiaries and associates, preparing executive reports, forecasting, budgeting, and related variance analysis on monthly and quarterly basis; assisting in consolidation of group companies with parent bank; monitored and supervised bank reconciliation statements and inter-company reconciliations.
- Audit Staff, JM Gada & Associates, Khimji Kunverji Chartered Accountants & Co., Mumbai, India (2006–2008)
  Responsibilities included executing Indian GAAP and IFRS audits, including reviews of quarterly financial information for publicly traded and privately held companies; conducting internal audits for compliance under the Sarbanes-Oxley Act of 2002; assessing risk and formulating the audit plan, testing the design, implementing, and analyzing key performance indicators and trends.

Professional Organizations:

- CFA Society of Houston, Member
- Texas Society of Certified Public Accountants, Former Member

Community Involvement:

- Active Volunteer at BAPS Charities, global non-profit organization

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