Drew K. Nelson, MS, CPA, CFA®

ASSOCIATE PORTFOLIO MANAGER, ASSISTANT VICE PRESIDENT

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Service Areas

Public Equities
Hedge Funds
Private Equity
Fixed Income
Personal Touch
Investment Services

Education

Texas A&M University, MS in Finance (2014)

Texas A&M University, BBA in Accounting (2014)

Certifications

CFA® charterholder, CFA Institute (2022)

Certified Public Accountant (2015)

At Sentinel Trust, Drew is a key part of a team responsible for managing multi-asset class client investment portfolios and internally and externally managed Sentinel Trust investment vehicles. He works closely with the Chief Investment Officer and contributes directly to support all aspects of portfolio management.

Drew joined Sentinel Trust with an educational background in accounting and finance and professional experience in public accounting and investment management firms. His professional experience includes valuation, compliance, due diligence, and building out operational efficiencies at investment managers. He is a Certified Public Accountant and is a CFA® charterholder.

Drew is active with his college alumni network serving the community. He enjoys spending time with his family and watching sports.

Professional Background:

- Investment Operations Analyst, Bridgeway Capital Management (2019–2022)
  Responsibilities included operational efficiency across multiple mutual funds and separately managed accounts representing over $5 billion in assets, valuation of illiquid securities, client billing, and overseeing transfer agency functions.
- Controller / Chief Compliance Officer, BlackGold Capital Management (2016–2019)
  Responsibilities included oversight and coordination of all investment operations and compliance efforts of the $1.2 billion alternative asset manager, chairing the firm's valuation committee, oversight of IT and technology functions, and leading investor relations and client acquisition efforts
- Assurance Associate, PricewaterhouseCoopers (2014–2016)
  Responsibilities included engaging in external audits with a focus on investment management clients, evaluating client operations and controls, and recruitment of new hires to the firm.

Professional Organizations:

- CFA Society of Houston, Member

Community Involvement:

- Texas A&M Association of Former Students, Class Agent
- Texas A&M 12th Man Foundation, Member

