

James C. Reed, MBA, CFA®

DIRECTOR OF BUSINESS OPERATIONS, MANAGING DIRECTOR, SHAREHOLDER

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Service Areas

Personal Touch

Investment Services

Education

The University of Texas at Austin, MBA (2009)

University of Houston-Downtown, BBA in Finance (2006)

Certifications

CFA® charterholder, CFA Institute (2017)

Jimmy is responsible for firm-wide investment and technology implementation. His areas of oversight include all fund flows, portfolio analytics, systems, and cybersecurity.

Before joining Sentinel Trust in 2016, Jimmy spent more than a decade in senior operational and financial planning roles at the following multinational legal and financial institutions: Bracewell LLP, Invesco LTD, and Van Kampen Investments. His many strengths include technology and systems, capital budgeting, forecasting and analysis, and compliance oversight of institutional activities.

Professional Background:

- Director of Financial Planning and Analysis and Sr. Manager of Business Operations, Bracewell LLP, Houston, TX (2012–2016)
  Responsibilities included managing the annual operating and capital budgets, maintaining firm-level revenue, expense and profitability forecasts, generation of periodic financial and management reporting, and ad-hoc financial and pricing support for senior partners.
- Senior Compliance Officer, Invesco LTD (2010–2012)
  Responsibilities included providing compliance coverage for multiple legal and operational entities, coordinated responses to regulators' inquiries into products and personnel, monitored compliance of business activities, and ensured timely and accurate creation of broker-dealer financial records and reports.
- Operations Management, Morgan Stanley/Van Kampen Investments (2002–2010)
  Responsibilities included the supervision of management and associates servicing a wide range of stakeholders in Morgan Stanley financial products within the global investment management business.

Professional Organizations:

- CFA Society of Houston, Member
- World Affairs Council of Greater Houston, Member

Community Involvement:

- Junior Achievement of Southeast Texas, Volunteer

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- Dress for Success Houston, Volunteer
- MS 150 Bike Ride, Volunteer

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