Sentinel Trust
Together, families prosper℠

www.sentineltrust.com

Katherine M. Rose, MBA, CFA®, CTFA

MANAGING DIRECTOR, SHAREHOLDER

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Service Areas

Personal Touch

Education

The University of Texas at Austin, MBA (2012)

The University of Texas at Austin, BBA in International Business (2006)

Certifications

CFA® charterholder, CFA Institute (2018)

Certified Trust and Fiduciary Advisor, American Bankers Association (2024)

At Sentinel Trust, Katherine is responsible for identifying and developing business prospects and strategic partners, joining Sentinel Trust in 2019 with a decade of experience in wealth management and business development.

Katherine also is the Founder and President of Friendship Smile, a Houston based charity dedicated to fostering positive environments and opportunities for the social development of children born with cleft lip and palate.

Professional Background:

- Vice President, Autumn Lane Advisors, Houston, TX (2016–2019)
  Responsibilities included serving as the outsourced Chief Investment Officer for four different families with total assets of approximately $500 million; developing and delivering financial planning services and investment advisory services to high-net-worth clients; and screening, reviewing, recommending, and performing due diligence for alternative investments including: hedge funds, real estate, private equity, and venture capital.
- Business Development Officer, Riveron Consulting, Houston, TX (2014–2015)
  Responsibilities included advising clients and prospects on IPO readiness and preparation, quality of earnings assessments, financial planning and forecasting, and M&A integration; and developing new business by expanding the firm's network and broadening firm relationships with strategic partners.
- Private Wealth Manager, Goldman Sachs, Houston, TX (2012–2014)
  Responsibilities included building comprehensive wealth management plans for high-net-worth individuals and families; recommending and implementing client portfolio changes to achieve the greatest return for a given risk level based upon assessing the marketplace and performing scenario analyses; and conducting comprehensive reviews of client portfolios including meetings with lawyers, accountants, and other advisors.

Professional Organizations:

- CFA Society of Houston, Member

Community Involvement:

- Special Olympics Advisory Board
- St. Pius X Foundation Board
- Friendship Smile, Founder and President
- The Briar Club Finance Committee, Member
- Iron Sommelier, Volunteer Committee Member
- The Women's Resource Committee, Member