



Katherine M. Rose, MBA, CFA

SENIOR INVESTMENT OFFICER, VICE PRESIDENT, SHAREHOLDER

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Service Areas

Personal Touch

At Sentinel Trust, Katherine is responsible for identifying and developing business prospects and strategic partners.

Education

The University of Texas at Austin, McCombs School of Business: MBA (2012)

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

Katherine joined Sentinel Trust after almost a decade of experience in wealth management and business development.

Katherine 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.

Certifications

Chartered Financial Analyst (2018)

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:

- Friendship Smile, Founder and President