Leslie Kiefer Amann, JD

OF COUNSEL

Phone: 713.630.9614 | Email: lkamann@sentineltrust.com

Service Areas

Philanthropic Services

Personal Touch

Fiduciary Services

Wealth Planning

Education

University of Houston, JD (1987)

The University of Texas at Austin, additional graduate studies (1977–1978)

Texas State University, BA in Music and Education and Texas Teaching Certificate (1976)

Leslie is Of Counsel to Sentinel Trust and serves as a strategic advisor on fiduciary and legal matters. In her prior role as Chief Fiduciary Officer, Leslie spent nearly fifteen years ensuring consistency and best practices where Sentinel Trust was named as trustee, executor, or agent. A background in business litigation and more than twenty-five years of experience administering trusts informed her work serving clients with complex fiduciary needs.

Prior to joining Sentinel Trust, Leslie was a Market Trust Executive for Bank of America and provided fiduciary counsel for a regional bank. In the first decade of her legal career, she litigated complex financial transactions on behalf of clients while in private practice. She taught as an Adjunct Professor at the University of Houston Law Center for twelve years.

Leslie spent three sessions (1977–1981) as a Legislative Aide to a State Senator and has drawn on that experience to promote trust reform legislation in Texas.

Leslie is a Fellow in the American College of Trust and Estate Counsel (ACTEC), a holder of the AEP designation from the National Association of Estate Planners and Councils (NAEPC), and a member of the NAEPC Speaker's Bureau. Active in the fiduciary community, she has served in leadership roles with the Texas Bankers Association, Houston Estate and Financial Forum, Houston Business and Estate Planning Council, and the Houston Bar Association's Probate, Trusts, and Estate Section Council. Leslie continues to write and present continuing education for national, state, and local bar associations, banking associations, and estate planning councils.

Professional Background:

- Senior Vice President and Market Trust Executive, Bank of America, N.A., Houston, TX (1997–2006)
  Responsibilities included management of personal trust and estate administrators, marketing, financial and estate planning advice, compliance, real estate, fiduciary litigation and risk management in Texas, Louisiana, and New Mexico. Also held positions of Trust Team Lead and Fiduciary Counsel.
- Assistant General Counsel, Vice President and Trust Officer, Charter National Bank, Houston, TX (1995–1997)
- Shareholder, Cunningham Burke Amann & Brooks, PC, Houston, TX (1993–1994)

- Attorney, Reynolds & Cunningham and predecessor firms, Houston, TX (1987–1993)

Professional Organizations:

- State Bar of Texas, Member
- State Bar of Texas Real Estate, Probate and Trust Section, Member
- American College of Trust and Estate Counsel (ACTEC), Fellow
- Houston Estate and Financial Forum, Former President and Director
- Houston Business and Estate Planning Council, Former President and Director
- Houston Bar Association, Member
- Houston Bar Association Probate, Trust and Estate Section, President-Elect
- Texas Banker's Association Wealth Management and Trust Advisory Council, Former Chair and Director; Inter-Governmental Relations Committee, Member and Education Committee Member

Talks:

- "Fun with Fiduciaries: Finding Fiduciaries, Selecting Successors, Delineating Duties, and Prescribing Protections," Co-Author and Presenter, American College of Trust & Estate Counsel (ACTEC) Summer 2021 National Meeting
- "Drafting and Interpreting Trust Distribution Provisions that: Say What You Mean and Mean What You Say," Author and Presenter, University of Texas CLE Annual Stanley M. Johanson Estate Planning Workshop, National Association of Estate Planners and Councils (NAEPC) Annual Planning Conference, and various member councils including Houston, Dallas, San Antonio, South Dakota, Central Texas, the Texas CPA Society Annual Estate Planning Conference, and the State Bar of Texas Estate Planning and Probate Drafting Conference.
- "Criteria for Selecting a Fiduciary: Choosing the Perfect Birdcage," Author and Presenter, Houston Estate and Financial Forum, South Texas College of Law Annual Wills and Probate Institute, and the Texas CPA Society Annual Estate Planning Conference.
- "How To Build A Modern Trust That Delivers What Clients Want," Co-Author and Presenter, State Bar of Texas Advanced Estate Planning and Probate Conference.
- Leslie has taught various subjects including Personal Trust Administration, Discretionary Distributions, and Ownership and Transfer Law for Trustees for the American Bankers Association, the Arkansas Bankers Association, and the Texas Bankers Association as well as its Trust and Graduate Trust Schools for more than 20 years.

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