Lissa S. Gangjee, JD, CFP®

PRESIDENT AND CHIEF EXECUTIVE OFFICER, SHAREHOLDER

Phone: 713.529.3729 | Email: lgangjee@sentineltrust.com

Service Areas

Family Governance and Education

Philanthropic Services

Personal Touch

Specialty Assets

Fiduciary Services

Wealth Planning

Investment Services

Education

Fordham Law School, JD (2005)

Smith College, BA in Comparative Literature (French & English) with secondary focus in Public Policy (1997)

Certifications

CERTIFIED FINANCIAL PLANNER™ Certification (2005)

As President and CEO of Sentinel Trust, Lissa is responsible for the day-to-day management of the firm.

Lissa has spent her entire career, more than twenty years, building businesses to effectively serve the unique needs of ultra-wealthy families. Prior to joining Sentinel Trust in 2012, she headed a regional branch of a $2 billion multi-family office where she was responsible for all aspects of that enterprise—business development, client service, planning, reporting, facilities, etc. Lissa began her career at U.S. Trust Company of New York. During her decade-long tenure at U.S. Trust, she led efforts to nationalize the planning, fiduciary, tax, estate settlement, and banking lines of business, served as Fiduciary Risk Manager, and was responsible for managing selected client relationships.

Active with her college alumnae and community networks locally, Lissa has served as Major Gifts Chair and on the President's Council of Smith College. Lissa is a member of the Texas Business Leadership Council. Lissa is also a member of the Young Presidents' Organization, serving as her Chapter Finance Chair and Forum Moderator.

Professional Background:

- Managing Director of Wealth Planning/Senior Relationship Manager, Threshold Group LLC, Portland, OR (2007–2012) – *Responsibilities included designing and delivering consistent financial planning services and resources to all Threshold clients. Coordinated relationship teams to deliver investment advisory services, accounting and tax management, financial education, estate planning, and other financial and wealth management services to $100+ million clients. Oversaw the Portland, Oregon, office of Threshold Group.*
- Senior Vice President, US Trust Company, New York, NY (1999–2007) – *During her near decade-long tenure at US Trust, Lissa served in various capacities, including but not limited to: Senior Product Manager, Director of Fiduciary Risk Management, Project Manager, Financial Planner, and Trust Administrator.*

Professional Organizations:

- Connecticut Bar Association, Member
- New York State Bar Association, Member
- State Bar of Texas, Member

- D.C. Bar, Member
- Washington State Bar Association, Member
- Young Presidents’ Organization, Chapter Finance Chair and Forum Moderator

Community Involvement:

- Collaboration for Families Flourishing, Former Member
- Smith College President’s Counsel, Former Member
- Smith College Class of 1997, Former Major Gifts Chair
- Texas Business Leadership Council, Former Member
- Hermann Park Conservancy Finance Committee, Former Member

Talks:

- “Healthcare Reform’s Effect on Single- and Multi-Family Offices: Procuring Medical Benefits for Small-Business Employees and Their Wealthy Clients” – IFG Wealth Management Forum