



## Marshall C. Gregory

ASSOCIATE PORTFOLIO MANAGER

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### Service Areas

Fixed Income

Marshall manages municipal opportunistic fixed income on behalf of Sentinel Trust's clients. He works with the investment team to source, evaluate, and monitor external fixed income managers as well as hone broker relationships.

### Education

Texas A&M University, BS in Economics (2014)

Prior to joining Sentinel Trust, Marshall traded a large equity and fixed income portfolio for a registered investment advisor here in Houston. He has also completed a rotation at BP as a financial analyst.

Marshall has spent more than a decade volunteering for the Houston Livestock Show and Rodeo, an organization that routinely raises in excess of \$25 million for scholarships and education annually.

### Professional Background:

- Trader and Equity Analyst, Haven Wealth Group, Houston, TX (2015–2016) – *Responsibilities included executing trading activities, reconciling client account, serving as a liaison between brokers and the portfolio management, creating account allocations utilizing target weights, performing equity and fixed income analysis, and conducting financial analytics and research using Bloomberg.*
- Credit Analyst, Texas Gulf Bank, Houston, TX (2014–2015) – *Involved in rotations in Private Banking, Corporate Banking, Real Estate Transactions, Middle Market, Commercial Lending and Syndications. Responsibilities included creating financial statements and models to analyze risk, track performance, forecast financial growth, and value entities.*
- Rotational Program Analyst, BP British Petroleum, Houston, TX (2014) – *Responsibilities included performing analysis on drilling wells and production utilizing SAP database, evaluation cash flows based on energy reserves and market trading values, calculating royalty payments, and performing lease valuations.*

### Community Involvement:

- Houston Livestock Show and Rodeo, International Committeeman Co-Captain
- Star of Hope Homeless Center, Volunteer
- The Salvation Army, Volunteer