



## Robert J. Sweeney, CPA, CFP®

OF COUNSEL, SHAREHOLDER

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### Education

Southwestern Graduate  
School of Banking at Southern  
Methodist University (1978)

St. Mary's University, BBA  
(1974)

### Certifications

CERTIFIED FINANCIAL  
PLANNER™ Certification  
(2004)

Certified Public Accountant  
(1974)

Bob is of Counsel to Sentinel Trust and serves as a strategic advisor to key relationships.

He previously served as a Senior Relationship Officer and Executive Vice President at Sentinel Trust prior to retiring after almost twenty years of service to the firm and its clients. Bob has worked in fiduciary administration and wealth management for more than 40 years and joined Sentinel Trust at its inception.

An active community member, he has served on the boards of the Kenedy Memorial Foundation (Corpus Christi), the Albert and Ethel Herzstein Charitable Foundation, the University of St. Thomas, and St. Agnes Academy.

### Professional Background:

- Robert J. Sweeney, CPA, Houston, TX (2015–present) – *Conducts family office and fiduciary consulting.*
- Executive Vice President and Senior Relationship Officer, Sentinel Trust Company, LBA Houston, TX (1996–2015) – *Participated in the founding of Sentinel Trust. Responsibilities included leading selected client relationships.*
- Vice President, Northern Trust Bank of Texas and its predecessor, Heritage Trust Company Houston, TX (1989–1996) – *Responsibilities included marketing, corporate finance, and management; served as Chief Operating, Chief Fiduciary, and Chief Banking Officer.*
- Executive Vice President and Director, Texas American Bank, Houston, TX (1979–1989)
- Vice President, Texas Commerce Bank, Houston, TX (1973–1979)
- Assistant Controller, Seiscom Delta, Houston, TX (1971–1973)
- Staff Accountant, Price Waterhouse, Houston, TX (1968–1971)
- United States Army Reserve, Active and Reserve Duty (1968–1974)

### Professional Organizations:

- The Estate Forum, Member and Former President
- TXCPA Houston, Member and Former President
- Houston Estate & Financial Forum, Member and Former President

- Houston Business & Estate Planning Council, Member and Former President
- Texas Society of Certified Public Accountants, Director and Former Executive Board Member
- American Institute of Certified Public Accountants, Member and Former Council Member

**Community Involvement:**

- Kenedy Memorial Foundation, Member, Officer, and Director
- Incarnate Word Academy, Former Advisory Board Member and President
- Downtown YMCA, Former Chairman, Director, and Member
- Albert and Ethel Herzstein Charitable Foundation, Former Advisory Director
- University of St. Thomas, Former Finance/Investment Committee Member
- St. Agnes Academy, Former Treasurer and Board Member
- Holy Name Passionist Retreat Center, Former Board Member and President