Sentinel Trust
Together, families prosper℠

www.sentineltrust.com

Ross W. Nager, MPA, CPA

OF COUNSEL, SHAREHOLDER

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Service Areas

Family Governance and Education

Philanthropic Services

Personal Touch

Wealth Planning

Education

The University of Texas at Austin, Master of Professional Accounting (1976)

The University of Texas at Austin, BBA with Honors (1975)

Certifications

Certified Public Accountant (1976)

Ross is Of Counsel to Sentinel Trust and serves as a strategic advisor on wealth planning and communication.

Ross led Sentinel Trust's strategic wealth planning efforts for over a decade before retiring from the firm. Prior to his tenure at Sentinel Trust, Ross led Arthur Andersen's worldwide Family Wealth Planning Practice and internal Family Wealth Planning Specialty Team, which was responsible for the practice's technical competence, client service quality and training. After retiring from Sentinel, he was a Managing Director of Andersen Tax, where he served some of that firm's wealthiest clients and was responsible for technical competence in family wealth planning.

Ross founded and served as Executive Director of Andersen's Center for Family Business to focus on the unique intersection of business, estate, and tax planning for families. He is frequent presenter on planning topics, including technical tax and estate challenges and opportunities, wealth education, and family business management, governance, and succession issues.

Professional Background:

- Managing Director, Andersen Tax LLC, Houston, TX (2002–2017)
  As a member of the U.S. National Tax Office, responsibilities included developing multi-generational strategic plans for some of the firm's wealthiest clients. Also responsible for the firm's technical competence in estate, gift, generation skipping, and trust income taxation.
- Partner, Arthur Andersen LLP (1983–2002)
  Responsibilities included *working directly with Andersen's wealthiest and most complex family clients. Formed and served as global Managing Director of Andersen's Family Wealth Planning Practice. Led Andersen's internal Family Wealth Planning Specialty Team, which was responsible for the practice's technical competence, client service quality, and training. Established and served as Executive Director of Andersen's Center for Family Business, which focused on resolving family businesses' unique issues and positioning both family and business for future success.*
- Staff through Manager, Arthur Andersen LLP (1977–1983)

Professional Organizations:

- Texas Society of Certified Public Accountants, Member

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- American Institute of Certified Public Accountants, Former Chairman, AICPA Estate and Gift Committee – *Led the successful effort to repeal the 1987 anti-estate freeze law.*
- Houston Estate and Financial Forum, Former President and Director

Talks:

- Frequent speaker at numerous professional and trade organization conferences on a wide range of topics including technical estate tax and planning, instilling appreciation for wealth in younger generation family members, and family business management, governance, and succession issues. Organizations addressed include AICPA Advanced Estate Planning Institute, Young Presidents Organization, National Automobile Dealers Association, Washington Bar Association, Family Office Exchange, Instituto de la Empresa Familiar (Spain), and Thunderbird School of Global Management.
- Leader of most Andersen Family Wealth Planning training sessions for over a decade.

Publications:

- Co-author of family business-related books: *Andersen Answers 101 Toughest Questions about Family Business*; *La Empresa Familiar por dentro*; and *L'Entreprise Familiale*
- Former Senior Editor and Writer: *The Family Business Advisor subscription newsletter*
- Co-author: *Andersen's Tax Economics of Charitable Giving*; *annual year-end individual income tax planning guides*; and *Oil and Gas Federal Income Tax Manual*
- Quoted in numerous publications, including The Wall Street Journal, The New York Times, Fortune, Forbes, Family Business, Business Week, and Nation's Business

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