Scott E. Snyder, CFA®, MBA, CAIA

HEAD OF EQUITIES, SENIOR VICE PRESIDENT

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Service Areas

Public Equities

Personal Touch

Investment Services

Education

The University of Denver, MBA in Finance (2010)

Arizona State University, BS in Finance, *summa cum laude* (2001)

Certifications

Chartered Alternative Investment Analyst (2020)

CFA® charterholder, CFA Institute (2006)

Scott is responsible for managing the U.S. and international equity strategies for Sentinel Trust's clients. He evaluates and monitors external equity managers and is involved with ongoing market research, analysis, and portfolio construction for global equity markets.

Scott joined Sentinel Trust with two decades of experience in wealth and portfolio management. Prior to joining Sentinel Trust, Scott served as portfolio manager of mutual funds focusing on international, emerging markets, and domestic equity strategies. He also has extensive experience integrating data and analytics systems into the overall investment management process.

Along his career, Scott has appeared on CNBC and TD Ameritrade Network and has been featured and quoted in publications including *Investment Advisor* magazine, *USA Today*, and *Bloomberg News*. In his spare time, he enjoys international travel, landscape photography, backyard barbecuing, running, skiing, and general fitness activities.

Professional Background:

- Portfolio Manager, Vice President of Investments, ICON Advisers, Greenwood Village, CO (2005–2019)
  Responsibilities included managing all facets of the portfolio management process of six mutual funds including stock selection, country, and sector level exposures; serving as a senior member of the Investment Committee to implement asset allocation decisions across fund-of-funds allocation portfolios; and overseeing the international funds growth and product development across region specific strategies.
- Assistant Portfolio Manager and Research Analyst, ICON Advisers, Greenwood Village, CO (2004–2005)
  Responsibilities included designing the data and analytics processes running the investment platform; developing investment recommendations and assisting portfolio managers with equity and options allocations; and improving valuation methods and reporting solutions for sector, industry, and country level analysis.
- Portfolio Analytics Specialist, FactSet Research Systems, San Mateo, CA (2003–2004)
  Responsibilities included implementing custom portfolio analytics solutions to meet the complex client needs of portfolio managers and analysts; specializing in portfolio attribution analysis, risk attribution, portfolio optimization, and style performance and risk returns-based analysis products;

and training new clients and colleagues on products and functionality.

- Senior Consultant, FactSet Research Systems, San Mateo, CA (2001–2003)
  Responsibilities included providing comprehensive support and training to new and existing investment management clients; developing and customizing solutions for a variety of investment needs using FactSet data and analytics; and coordinating account management and future client goals with sales team.
- Financial Advisor, The Dollarhide Financial Group, Scottsdale, AZ (1999–2001)
  Responsibilities included recommending investment and insurance products under the Mass Mutual umbrella to address needs and suitability for current and prospective clients.

Professional Organizations:

- CAIA Texas, Chapter Member
- CFA Society of Houston, Member
- CFA Society of Colorado, Former Member

Community Involvement:

- Denver Snow Angels
- Meals on Wheels
- Tempe Diablos

