



SueEllyn Kunkel

OPERATIONS MANAGER, VICE PRESIDENT

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Service Areas

Personal Touch

Education

Texas A&M at Galveston, BS
in Maritime Administration
(2003)

At Sentinel Trust, SueEllyn handles all operation requirements of accounts, and oversees fiduciary cash management, trust system maintenance, new and terminating accounts, securities settlement and custody, document preparation and review, and records management. In addition, she serves as backup for the firm's accounts payable and receivable functions.

SueEllyn joined Sentinel Trust in 2023 with fifteen years of experience in oversight of day-to-day trust and bank operations functions. Prior to joining Sentinel Trust, SueEllyn served as a Trust Operations officer at multiple companies.

SueEllyn is active with her college alumni and community networks locally.

Professional Background:

- Vice President, Trust Operations Officer, Westwood Trust (formerly Woodway Financial Advisors), Houston, Texas (2012—2023)
Responsibilities included oversight of day-to-day operations activities (including, among other things, processing transactions concerning client accounts, bill payment, corporate action posting, private equity and unique asset maintenance), serving as technical liaison between Westwood IT and Operational vendors, working to ensure information for tax filings was provided to appropriate companies and filed in a timely manner, being responsible for fee processing, and serving as project manager for enhanced client service, improved efficiencies, and improved risk management.
- Trust Operations Officer & Risk Manager, Horizon Trust & Investment Management/Horizon Bank, NA Michigan City, Indiana (2007—2012)
Responsibilities included ensuring advisor compliance with existing policies and procedures, monitoring client transaction activity for risk/fraud, reviewing and updating regulatory reports and serving as point of contact for internal and external audit exams, and serving as project manager for enhanced client service, improved efficiencies, and improved risk management.
- Administrative Officer, Horizon Trust and Investment Management, Michigan City, Indiana (2005—2007)
Responsibilities included managing execution of financial planning seminars through Horizon's market area, assisting executives and team with daily activities (including scheduling appointments, customer service calls, arranging travel, and assistance to daily administration), and partnering with Trust team members in the development of client relationships.