

Todd A. Burchett, FRM, CAIA, CFA®

CHIEF INVESTMENT OFFICER, SENIOR MANAGING DIRECTOR, SHAREHOLDER

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Service Areas

Public Equities

Hedge Funds

Private Equity

Fixed Income

Personal Touch

Investment Services

Education

The Ohio State University, MBA in Finance (2005)

The Ohio State University, MS in Development Economics and Finance (2005)

University of Mississippi, MA in Curriculum and Instruction (2001)

Stanford University, BA in Economics (1997)

Certifications

CFA® charterholder, CFA Institute (2009)

Chartered Alternative Investment Analyst (2009)

Financial Risk Manager – Certified by the Global Association of Risk Professionals (2007)

At Sentinel Trust, Todd is responsible for investment strategy, overseeing teams responsible for all asset classes, and making strategic and tactical allocation decisions across all portfolios.

Todd joined Sentinel Trust after gaining nearly twenty years of experience in wealth and portfolio management. Prior to joining Sentinel Trust in 2019, Todd served as a Managing Director of the Portfolio Management Team for a $6B multi-family office largely servicing professional investors. He also served as the Chair of the Investment Steering Committee and as a voting Investment Committee Member. Prior to that role, Todd ran an institutional-sized single-family office on the West Coast and several mutual funds for a boutique investment firm in Colorado.

Before entering the field of finance, Todd served as an AmeriCorps VISTA member and taught with the Mississippi Teacher Corps.

Professional Background:

- Managing Director, Athena Capital Advisors, LLC, Lincoln, MA (2013–2019)
  Responsibilities included co-leading a team of 13 investment and client service professionals in a multi-family office with $6 billion in assets under advisement; overseeing 13 distinct relationships totaling $2 billion including all aspects of investments, risk management, performance reporting, tax, estate, and insurance planning; and serving as Chair of the Investment Steering Committee which allocated resources for the 23-person Research team and on the Investment Committee which set strategic, tactical, and manager allocations across all client portfolios.
- Portfolio Manager, Teknekron, LLC, Incline Village, NV (2011–2013)
  Responsibilities included managing direct and indirect investments across all asset classes for an institutional-sized single family office; executing due diligence for all investments and external managers; and creating and maintaining various portfolios including a non-guaranteed mortgage backed securities portfolio, a pure US equity portfolio, a MLP-focused portfolio, an in-house hedge fund of funds portfolio and a gold portfolio built with advanced statistical techniques.
- Associate and Investment Committee Member, Round Table Wealth Management, Westfield, NJ (2011)
  Responsibilities included pioneering all facets of private Multi-Strategy Tactical Asset Fund; overseeing $250 million in fixed income assets; and analyzing and providing client-specific recommendations on a variety of public and private assets for high-net-worth individuals and multi-

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generational families. Hired away by client to run their single-family office.

- Portfolio Manager and Investment Committee Member, ICON Advisers, Greenwood Village, CO (2005–2010)
  Responsibilities included managing three quantitative value-oriented debt and equity funds, serving on the Investment Committee which oversaw the firm's $6 billion in assets, and leading major improvements to the firm's quantitative models and systems.

Professional Organizations:

- CFA Society of Houston, Member
- Global Association of Risk Professionals (GARP), Member
- Chartered Alternative Investment Analyst Association, Member

Community Involvement:

- Save The Children, Former Volunteer
- AmeriCorps VISTA, Former Volunteer
- Tahoe Women's Service, Former Volunteer
- Mississippi Teacher Corps, Former Member
- Heifer International, Former Member of the Ambassador's Council
- Parent Teacher Organization, Former Volunteer

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