Fiduciary Services

People

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Sentinel Trust serves as trustee, co-trustee, executor, and agent in fiduciary matters. We are qualified as a corporate trustee, chartered by the State of Texas, and under the supervision of the Texas Department of Banking.

For wealthy families, trusts are rarely standalone entities. **Sentinel Trust thinks about fiduciary administration and investment in the context of the family's entire multigenerational wealth planning.** We embrace complexity and administer trusts that hold complex and illiquid assets such as family businesses, family limited partnerships, real estate, and oil and gas. We often administer trusts where assets include residences and other personal use property that have been placed there for estate tax savings. On multiple occasions, we have coordinated the decanting and reformation of trusts to maximize tax benefits and simplify structures.

Our relationship officers work to ensure beneficiaries understand the trust's provisions and the grantor's intent. When a family member has multiple trusts, we analyze the features of each one to recommend which trust should be used for what purpose in order to achieve the best tax result for current and future beneficiaries.

As fiduciary, our goal is to allow creativity and flexibility in trust administration while adhering to the grantor's intent, the provisions of the trust document, and governing law.