



Private Equity

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Private equity investment requires a long-term time horizon and the ability to withstand risk, making it a core asset class for families with multigenerational wealth.

Our founding families' experience with private equity through managed funds and direct investments began decades before they created Sentinel Trust. Clients benefit from the relationships and expertise formed by the founding families and our subsequent programs that have offered diversified private equity exposure, giving clients equal access to institutional-quality managers.

We incorporate our tax discipline by prioritizing strategies that realize investment profits as long-term capital gains instead of ordinary income.

Our private equity strategies focus on three broad areas:

- **Corporate Finance** includes strategies such as leveraged buyouts, mezzanine financing, expansion capital, and distressed debt. These managers work with mature private businesses to increase operational efficiency, restructure the balance sheet to improve the business' value, and, if appropriate, sell it.
- **Venture Capital** strategies invest at the early stage of a business' life cycle, perhaps even before the business has any revenues. These managers are looking for innovative entrepreneurs who can create fast-growing companies.
- **Real Estate** investments include commercial properties such as office buildings and malls, residential properties such as apartment complexes, timber, agriculture, and energy-producing assets. Managers may pursue an income-generating strategy or one that adds value to the asset for future resale.

We are active in the private equity community and partner with outside consultants to source opportunities and conduct due diligence. **Private equity funds want Sentinel Trust as an investor** because we are large enough to enhance a fund's investor base—including serving on advisory committees—yet nimble enough to quickly commit to small funds, emerging managers, and opportunistic niche strategies.