

Personal Touch

People

Christi N. Arrington, CPA
David A. Bristol, Jr.
Todd A. Burchett, FRM, CAIA, CFA®
Mayra A. De Leon, CPA
Damon L. Drouet, MBA
Matthew P. Duncan, CIPM
D. Fort Flowers, Jr., CFA®
Lissa S. Gangjee, JD, CFP®
Kelsey W. Gray, JD
Brandon D. Harsell, CPA
Michael J. Hoffman, Sr., JD
SueEllyn Kunkel
Lucita C. Landers
Julie A. McCaughey, JD
Ross W. Nager, MPA, Retired CPA
Drew K. Nelson, CPA, CFA®, CAIA
Sophia Papadopoulos, CPA, CFA®
James C. Reed, MBA, CFA®
Katherine M. Rose, MBA, CFA®, CTFA
Scott E. Snyder, CFA®, MBA, CAIA
Ingrid Y. Tang, CAIA, MBA, CFA®
Devangi D. Thakkar, CPA, MBA, CFA®
Stephanie A. Trejo

As a family's wealth grows, so do the complexities of managing its affairs. Sentinel Trust relieves this burden through its extensive capabilities to deliver family office services with a personal touch. Because each relationship officer serves only a few client families, we strive to know client families intimately and anticipate their needs.

Taking on administrative tasks helps us do better wealth planning. It gives the relationship team deep insight into a family's immediate and long-term needs and plans.

Our offering is designed to be adaptive. When we can solve a problem in-house, we do; when we need outside help, we find and coordinate appropriate resources who share our focus on families with multigenerational wealth.

We support families with in-house expertise in the following ways:

Administration of Wealth

- Paying bills and managing cash flow needs across family entities.
- Consolidated accounting and reporting on investments held at Sentinel Trust and at other managers to give a complete view of exposure and performance.
- Bookkeeping for individuals and closely held entities such as Family Limited Partnerships.
- Assuring that family business and investment entities are administered correctly to preserve the tax, liability, or estate-planning features that prompted their initial use.

Assistance with Personal Assets

- Facilitating the leasing, purchase, renovation, and disposition of high-value personal assets such as residences, aircraft, and watercraft.
- Coordinating insurance coverage for personal assets with the client's insurance broker or agent.
- Coordinating appraisals of real estate, art, jewelry, and collectibles for investment, estate planning, and/or insurance purposes.

©2026 Sentinel Trust Company, LBA All Rights Reserved | T 713.529.3729 | info@sentineltrust.com

Anne-Lise A. Wiegand, CPA
David L. Zahn, CPA, CFP®

Management of Domestic Staff

- Sourcing, interviewing, and advising on personal staff such as housekeepers, nannies, elder care, and personal assistants.
- Processing of payroll and benefits for all domestic staff.
- Assisting in the periodic review of domestic staff members and handling any disciplinary issues that may arise.

Aid with Charitable Requests

- Operating as a mail room to screen and prioritize philanthropic requests.
- Reporting on the impact of charitable gifts.
- Identifying worthy organizations to support a family's charitable goals.
- Bookkeeping for and assisting with the administration and management of family foundations.

Health, Wellness, and Lifestyle Support

- Advising on and assisting with obtaining adequate health care coverage.
- Coordinating medical service providers and elder-care needs.
- Serving as a personal back office to prepare paperwork.
- Making travel arrangements, including specialty guides and planning for medical emergencies overseas.
- Managing risk through regular insurance reviews and consultations on physical and cyber security.

In many cases, we work in conjunction with a family's own family office staff. In those situations, we work closely with that staff to make sure all needs are met seamlessly.

In virtually all cases, our family office services are covered by a client's global fee so there are no hourly or à la carte fees.

©2026 Sentinel Trust Company, LBA All Rights Reserved