



A. Lizette Montano

CLIENT RELATIONSHIP OFFICER, ASSISTANT VICE PRESIDENT

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Service Areas

Philanthropic Services

Personal Touch

Fiduciary Services

Wealth Planning

At Sentinel Trust, Lizette supports the delivery of investment, planning, fiduciary, administrative, and family office services for a select group of clients.

Lizette joined Sentinel Trust in 2020 as a Client Service Associate with an educational background in business administration in marketing. Before joining the client service team at Sentinel, Lizette performed various general business functions for a marketing consulting firm.

Lizette is active with her university's alumni networks locally.

Education

University of Arizona, BS in Business Administration in Marketing (1997)

Professional Experience:

- Senior Client Service Associate, Sentinel Trust Company, LBA, Houston, TX (2020 – 2023)
Responsibilities included assisting with the delivery of investment, planning, fiduciary, administration, and family office services to a select group of Sentinel Trust clients.
- Office Administrator, Accesum Consulting, Houston, TX (2014 – 2018)
Responsibilities included planning product showcasing for trade shows in Central America, maintaining office and CEO's expenses, and planning domestic and international travel for CEO.
- Registered Sales Assistant, UBS International, Houston, TX (2001 -2008)
Responsibilities included opening and maintaining credit lines, trusts and investment accounts for non-resident alien clients, executing foreign exchange transactions, assisting brokers with trading activities, and researching information for new product ideas and investments.

Professional Organizations:

- Houston Estate & Financial Forum, Member