



## Lissa S. Gangjee, JD, CFP<sup>®</sup>

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Lissa S. Gangjee has spent her career building highly successful businesses that serve the unique needs of ultra-wealthy families. She brings more than two decades of experience in financial planning and wealth management, together with an exceptional track record in business development. Forward-thinking and intuitive, Lissa is an accomplished manager who excels at leading teams to achieve their best performance. Her combination of strategic vision, operational skill and industry expertise make her an asset to every organization in which she serves.

Lissa is currently President and CEO of Sentinel Trust, an independent wealth management firm and multi-family office responsible for more than \$5 billion and 30 client-families. Sentinel provides a comprehensive suite of services to a select group of affluent families and their closely-held entities and foundations. They include investment management, succession and wealth planning, fiduciary services, philanthropic strategy and family-office management. In addition to her role as chief executive, Lissa sits on the Board of Directors of Sentinel Trust.

Previously Lissa served as Managing Director of a regional branch of a multi-family office with \$2 billion in assets under management. She was responsible for all aspects of the enterprise, including business development, client service and financial planning. Lissa began her career with U.S. Trust of New York. During her decade-long tenure, she led efforts to nationalize the planning, fiduciary, tax, estate settlement, and banking lines of business. Lissa also served as Fiduciary Risk Manager and managed select client relationships.

A native of Oregon, Lissa earned a Juris Doctor degree from Fordham Law School and a Bachelor of Arts degree from Smith College. She is a CFP<sup>®</sup> professional. She is active in the Connecticut, New York, Texas, D.C., and Washington State Bar Associations as well as her college alumnae and community networks. Lissa sits on the Board of Directors for the Memorial Park Conservancy in Houston and is also a member of several professional organizations including her YPO Chapter and Forum.