Lissa S. Gangjee, JD, CFP®

PRESIDENT AND CHIEF EXECUTIVE OFFICER, SHAREHOLDER

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Service Areas

Family Governance and Education

Philanthropic Services

Personal Touch

Specialty Assets

Fiduciary Services

Wealth Planning

Investment Services

Education

Fordham Law School, JD (2005)

Smith College, BA in Comparative Literature (French & English) with secondary focus in Public Policy (1997)

Certifications

CERTIFIED FINANCIAL PLANNER™ Certification (2005)

Lissa began her tenure at Sentinel Trust as the Director of Client Service, responsible for overseeing the day-to-day decisions in Client Service and leading the firm's team of Client Service professionals who provide organizational thought leadership for the firm's clients. In 2015, Lissa was promoted to President of Sentinel Trust and was further promoted to President and CEO in 2019. As President and CEO of Sentinel Trust, Lissa is responsible for the day-to-day management of the firm including active participation as a member of the Sentinel Trust Board of Directors, the Investment Committee, and the Investment Advisory Committee.

Lissa has spent her entire career, more than twenty years, building businesses to effectively serve the unique needs of ultra-wealthy families. Prior to joining Sentinel Trust in 2012, she headed a regional branch of a $2 billion multi-family office where she was responsible for all aspects of that enterprise—business development, client service, planning, reporting, facilities, etc. Lissa began her career at U.S. Trust Company of New York. During her decade-long tenure at U.S. Trust, she led efforts to nationalize the planning, fiduciary, tax, estate settlement, and banking lines of business, served as Fiduciary Risk Manager, and was responsible for managing selected client relationships.

Active with her college alumnae and community networks locally, Lissa currently serves as Vice Chairman of the Board of Directors for the Memorial Park Conservancy, also sitting on their Finance, Compensation, and Executive Committees. She has previously volunteered as Major Gifts Chair and as a member of the President's Council of Smith College, her alma mater. Lissa is a member of the Young Presidents' Organization and has served as her chapter's Finance Chair and Forum Moderator. Lissa is also a former member of the Texas Business Leadership Council.

Professional Background:

- Managing Director of Wealth Planning/Senior Relationship Manager, Threshold Group LLC, Portland, OR (2007–2012)
  Responsibilities included designing and delivering consistent financial planning services and resources to all Threshold clients. Coordinated relationship teams to deliver investment advisory services, accounting and tax management, financial education, estate planning, and other financial and wealth management services to $100+ million clients. Oversaw the Portland, Oregon, office of Threshold Group.
- Senior Vice President, US Trust Company, New York, NY (1999–2007)
  During her near decade-long tenure at US Trust, Lissa served in various capacities, including but not

limited to: Senior Product Manager, Director of Fiduciary Risk Management, Project Manager, Financial Planner, and Trust Administrator.

Professional Organizations:

- Connecticut Bar Association, Member
- New York State Bar Association, Member
- State Bar of Texas, Member
- D.C. Bar, Member
- Washington State Bar Association, Member
- Young Presidents' Organization, Former Chapter Finance Chair and Forum Moderator

Community Involvement:

- Memorial Park Conservancy, Vice Chairman of the Board and Member of Finance Committee and Executive Committee
- Collaboration for Families Flourishing, Former Member
- Smith College President's Counsel, Former Member
- Smith College Class of 1997, Former Major Gifts Chair
- Texas Business Leadership Council, Former Member
- Hermann Park Conservancy Finance Committee, Former Member

Talks:

- "One CEO's Story: Guiding a Workforce through a Pandemic," Texas Wall Street Women, October 2020
- "Healthcare Reform's Effect on Single- and Multi-Family Offices: Procuring Medical Benefits for Small-Business Employees and Their Wealthy Clients" – IFG Wealth Management Forum

