CitizensTrust™

R. Daniel Banis, Executive Vice President and Head of CitizensTrust

R. Daniel Banis brings over 30 years of financial services industry experience to his role as Head of CitizensTrust. He has worked in leadership roles for Security Pacific National Bank, Bank of America, Fidelity Investments, First American Trust, and MullinTBG/Prudential Retirement. Mr. Banis earned his Master of Business Administration and his Bachelor of Arts Degree in Business Administration with an emphasis in Finance from California State University at Los Angeles.

Donald E. Evenson, CFA, Senior Vice President and Chief Investment Officer

Donald E. Evenson brings more than 25 years of investment industry experience to his role as Chief Investment Officer for CitizensTrust. Prior to joining CitizensTrust, he managed funds and advised on strategy at AVR Asset Management, Trust Company of the West (TCW), and Provident Investment Counsel. Mr. Evenson received his Master of Business Administration with a concentration in Finance from the University of Southern California and earned his Bachelor of Science Degree in Business Administration from St. Mary's College of California.

Thomas L. Trine, Senior Vice President and Trust Services Manager

Thomas L. Trine has more than 30 years of experience in the Trust and Wealth Management industry. Prior to joining CitizensTrust, he was a Director at Hitachi Consulting, where he served as program manager for trust, brokerage, and banking system implementations. Mr. Trine served on the ABA National Trust School's Board of Advisors and holds a Bachelor of Art Degree from University of California, Los Angeles and an Master of Business Administration from California State University, Fullerton.

Rhonda Malone, CSOP, Vice President and Trust Client Services & Operations Manager

Rhonda Malone joined CitizensTrust in 2005. She began her career at Hibernia National Bank in New Orleans, Louisiana and has worked in the trust operations field since 1984. Ms. Malone received her designation as a Certified Securities Operations Professional (CSOP) from the Cannon Financial Institute. She also serves on the board of the FIS Trust User Group.

Carl White, CFA, Vice President and Performance & Client Reporting Manager

Carl White brings over 28 years of investment industry experience to his role as manager of CitizensTrust investment performance and client reporting. Prior to joining CitizensTrust in December of 2012, he held various roles including portfolio manager, retirement specialist, and investment consultant for investment firms including Tradewinds Global Investors/Nuveen and Roger Engemann & Associates. Mr. White earned his Bachelor of Science Degree in Finance from University of Southern California. He also holds the Chartered Financial Analyst (CFA) designation and is a member of the CFA Society of Los Angeles.

Stephen E. Hill, Senior Vice President and Private Client Advisor

Stephen E. Hill has a professional career spanning more than 20 years providing wealth management and financial services to wealthy individuals and family owned businesses. He is a graduate of the University of Colorado where he earned a Bachelor of Arts Degree in Economics. Mr. Hill also attended Ventura School of Law, with a focus on Entertainment Law.

Aaron L. Childress, Vice President and Investment Analyst

Aaron L. Childress specializes in internal asset management research and due diligence regarding external managers and funds. Prior to joining CitizensTrust, he was an investment analyst at Bear Stearns, responsible for functions including equity research, performance reporting, and fund manager due diligence. Mr. Childress is a CFA Level III candidate and he earned his Master of Business Administration Degree from Wharton, where he was a Joseph Wharton Fellow. He received his Bachelor of Arts Degree in Economics from Morehouse College.

Steven Marrs, Vice President and Senior Investment Manager
Steve Marrs has nearly 40 years of experience serving as an investment manager, securities analyst, and trader. He is responsible for overseeing the equity research process for CitizensTrust and serves on the CitizensTrust Investment Policy Committee. Previously, Mr. Marrs worked as a business valuation consultant and research analyst.

Richard McDonald, CFA, Vice President and Investment Manager
Richard McDonald has over 15 years of industry experience. He is responsible for leading the fixed-income process for CitizensTrust and serves on the CitizensTrust Investment Policy Committee. Mr. McDonald worked previously as a security analyst at Eakle Associates, Inc. He holds the Chartered Financial Analyst (CFA) designation and serves as a member of the CFA Institute and its member societies in Los Angeles and New York.

Susan Sayer, Vice President and Investment Manager
Susan Sayer has over 20 years of experience working with trusts, wealth management, investments, and portfolio management. Her experience includes both portfolio and relationship management roles, as well as domestic equities research. Ms. Sayer earned her Bachelor of Arts Degree in Mathematics and Economics from the University of California, Santa Barbara. She is also a member of the CFA Society of Los Angeles.

Lisa Harwood, CTFA, Vice President and Senior Portfolio Manager
Lisa Harwood delivers distinctive wealth management services to prominent families, business owners, individuals, and foundations. Drawing on an extensive trust and investment management background, including specialized knowledge of estate planning, tax, financial consulting, and banking, Ms. Harwood supports her clients' complex financial and personal needs. She earned both a Master of Business Administration Degree with emphasis in Finance and a Bachelor of Science Degree in Electrical Engineering from the University of Southern California.

Joel Napalan, CTFA, Vice President and Senior Trust Officer
Joel Napalan is a Certified Trust and Financial Advisor with over 15 years of experience in trust administration. He works with other wealth management associates to provide personal trust, estate, and investment management services. Mr. Napalan is a Board Member of the Long Beach Community Hospital, associate member of the Orange County Bar - Trust and Estate section, and a member of the Estate Planning & Trust Council of Long Beach.

Marimil de la Sierra, CRSP, Vice President and Senior Trust Officer
Marimil de la Sierra is a Certified Retirement Services Professional with more than 25 years of experience in the employee benefit arena. Prior to joining CitizensTrust in 1998, she worked with the Special Fiduciary Services Division of U.S. Trust Company of California, N.A. She also served on the Board of the Western Pension & Benefit Conference, Los Angeles Chapter from 2006 through 2010.

Linda Verburgt, CTFA, Vice President and Senior Trust Officer
Linda Verburgt is a Certified Trust and Financial Advisor with over 25 years of experience in trust administration. Her specialization includes Special Needs Trust administration and Settlement Trust management. Ms. Verburgt is a past President of the Citrus Estate Planning Council and past Chairperson of the Board of Community Senior Services, Claremont, California.