Agenda Item #: 4F

PALM BEACH COUNTY BOARD OF COUNTY COMMISSIONERS

BOARD APPOINTMENT SUMMARY

Meeting Date:

October 16, 2012

Department:

Submitted By:

Office of Financial Management and Budget

Submitted For:

Investment Policy Committee

I. EXECUTIVE BRIEF

Motion & Title: Staff recommends motion to approve: Appointment of one of the following individuals to the Investment Policy Committee.

<u>Nominee</u>

Seat No.

Nominated By

Ned Nashban

2

Commissioner Aaronson

Commissioner Vana

Commissioner Abrams

OR

Michael Schmidt

2

Commissioner Marcus Commissioner Taylor

Summary: Larry Zalkin has vacated his seat on the Investment Policy Committee (IPC) and his seat on the Committee needs to be filled. The Committee is comprised of seven members, including a current member of the Board of County Commissioners, four representatives from the private sector approved by the BCC, a designee of the Palm Beach County Sheriff's Office, and an employee of the Office of Financial Management and Budget selected by the County Administrator. Commissioner Aaronson currently serves as the Board's representative and as the Committee's Chairman.

Mr. Nashban has disclosed that he is employed with the firm of Akerman Senterfitt, which has one (1) existing contract with the County for State lobbying services. The Investment Policy Committee provides no regulation, oversight, management or policy setting recommendations regarding the subject contract. Disclosure of this contractual relationship at a duly noticed public hearing is being provided in accordance with the provisions of Sec. 2-443, of the Palm Beach County Code of Ethics. Mr. Schmidt currently serves as a member of the County Financing Committee. Countywide (PK)

Background and Justification: Per Ordinance No. 87-11, Section 9 (Investment Ordinance), approved June 9, 1987, Chapter 218.415, F.S., the Committee shall meet three times per annum, or at the call of the Chairman. The IPC shall address such issues as liquidity, risk diversification, safety of principal, yield, maturity, and investment quality, as well as qualifications of investment dealers and issuers, thereby suggesting guidelines for use in the investment of County funds. As Larry Zalkin vacated his seat on the Committee, it now needs to be filled. Of the seats currently filled three (3) are white males (50%), two (2) black males (33.33%) and one (1) white female (16.67%).

Attachments:

1. Applications with resumes.

Recommended by:

Pepartment Director

7/3//2 Date

Legal Sufficiency:

Assistant County Attorney

Date

II. REVIEW COMMENTS

١.	Other Department Review:
	Department Director

The information provided on this form will be used by County Commissioners and/or the entire Board in considering your nomination. This form MUST BE COMPLETED IN FULL. Answer "none" or "not applicable" where appropriate. Further, please attach a biography or résumé to this form.

Section I (Depart	ment): (Please	Print)								
Board Name:	Investment Po	licy Commit	tee				Advisory	X) N	ot Advisory	1)
[X] At La	arge Appointm	ent	O),	[] District	Appoint	ment /Distric	ot #:		
Term of Appointm	ent: Cont	inuous Ye	ears.	From: Dat	te of Appoin	tment	To: Vac	eating the	Committee	
Seat Requirement:				t banking or mu bination or exp			Seat #:	2		
[]*Reapp	pointment		or	[] New App	ointmen	nt			
or [X] to con Completion of term t		•	y Zalkin inuous		_ Due to:	[X]	resignation	n [] other	
*When a person is term shall be cons						disclose	ed voting co	nflicts di	uring the pre	vious
Section II (Applied APPLICANT, UNI			T BE A CO	UNTY RESIDI	ENT					
Name: N	Vashban			Ned			Roger			
Cocupation/Affiliat	Last			First			Middle			
Оссиранош/хинас			72.7	~ .		 ,		· f 3		
*	Si	areholder [. Х. Ј	Emplo	yee []		Offi	icer []		
Business Name:	Al	cerman Sent	erfitt							
Business Address:	_ 24	24 N. Fedei	al Highway,	Suite 410					·	-
City & State	Во	oca Raton, F	<u>L</u>		Zij	p Code:	334	31		
Residence Address	: 60	03 N.W. 23	rd Way							
City & State	Во	ca Raton, F	L		Zij	Code:	334	96		
Home Phone:	(561) 99	5-8599		Business I	Phone:	(561)	862-4012 E	Ext.		
Cell Phone:	(561) 35	8-8230		Fax:		(561)	368-4660			
Email Address:	ned.nasl	ban@akern	nan.com			-				
Mailing Address Pre	eference: [X]	Business	[] Residen	ce .						
Have you ever been If Yes, state the cou				No X e and date:		·				
Minority Identifica		[X] Mal	e ic-American	[] Femal	e -American	[] A	frican-Amer	rican [X] Caucasian	

{24573715;1}Page 1 of 2

Section Il Continued:

CONTRACTUAL RELATIONSHIPS: Pursuant to Article XIII, Sec. 2-443 of the Palm Beach County Code of Ethics, advisory board members are prohibited from entering into any contract or other transaction for goods or services with Palm Beach County. Exceptions to this prohibition include awards made under scaled competitive bids, certain emergency and sole source purchases, and transactions that do not exceed \$500 per year in aggregate. These exemptions are described in the Code. This prohibition does not apply when the advisory board member's board provides no regulation, oversight, management, or policy-setting recommendations regarding the subject contract or transaction and the contract or transaction is disclosed at a public meeting of the Board of County Commissioners. To determine compliance with this provision, it is necessary that you, as a board member applicant, identify all contractual relationships between Palm Beach County government and you as an individual, directly or indirectly, or your employer or business. This information should be provided in the space below. If there are no contracts or transactions to report, please verify that none exist. Staff will review this information and determine if you are eligible to serve or if you may be eligible for an exception or waiver pursuant to the code.

Contract/Transaction No.	Department/Division	Description of Services	Term
Ex: (R#XX-XXXX/PO XXX) *R 2005-2299	Parks & Recreation Palm Beach County Board of County Commissioners	General Maintenance Lobbying	10/01/11-09/30/12 12/11 - 9/12
See Attached Exhibit A		Shect(s), if necessary) NONE	· · · · · · · · · · · · · · · · · · ·
Guide to the Sunshine Amendmon the web at: http://www.palu	ent prior to appointment/reappoin nbeachcountyethies.com/training	Article XIII, the Palm Beach Countment. Article XIII, and the traing thin. Keep in mind this requires terstand, and agree to abide by	ding requirement can be found ment is on-going.
County Code of Ethics, a	nd I have received the required tehing the training program on the ending a live presentation given of	Ethics training (in the manner cl	necked below):
	AND		
By signing below I ack Amendment & State of F		nderstand and agree to abide b	y the Guide to the Sunshine
*Applicant's Signature:	Common Brimmon	Name: Ned R. Nashban	Date: 7/26/12
		nch County Code of Ethics, please tethics@palmbeachcountyethics.c	
	Return this Insert Linison Name Here], (In Insert Add	sert Department/Division Here}	
Section III (Commissioner, if ap	pplicable):		
Appointment to be made	at BCC Meeting on;		
Commissioner's Signature:	not see	Date: 7-30	-12



Ned R. Nashban



Practices Litigation

Education

J.D., University of Wisconsin Law School, 1973

B.A., University of Wisconsin -Madison, 1973; Political Science

Bar Admissions Florida Wisconsin

Shareholder

2424 North Federal Highway Suite 410 Boca Raton, FL 33431

Tel: 561,368,2151 Fax: 561,368,4668

ned.nashban@akerman.com

Ned Nashban has more than 30 years of experience in the areas of maritime law, business law, commercial litigation, bankruptcy or creditor's rights, and problem loan workouts. His global practice focus includes prosecuting or defending litigation in or related to bankruptcy cases, including preference claims, fraudulent transfer claims, and non-dischargeability litigation, and the representation of purchasers of assets out of bankruptcy estates. In addition, Nashban has a vast amount of maritime and admiralty experience in North and South America, the Caribbean, and in the Middle East. He works with clients worldwide including those in the United Kingdom, Brazil, Mexico, Canada, China, Italy and Israel.

Awards & Recognition

• Martindale-Hubbell, AV Rated

Court Admissions

- U.S. District Court, Middle District of Florida
- U.S. District Court, Southern District of Florida
- U.S. District Court, Eastern District of Wisconsin
- U.S. District Court, Western District of Wisconsin
- U.S. Supreme Court

Professional Memberships & Activities

- Development Corporation for Israel, National Board Member
- American Bar Association, Member
- Milwaukee Bar Association, Bankruptcy Law, Real Property, Probate and Trust Law Sections, Member
- Commercial Law League of America, Member
- Bankruptcy Bar of South Florida, Member
- Palm Beach County Bar Association, Member
- Palm Beach County State of Israel Bonds, Chairman
- North American Jewish Forum and Israel Forum, Member
- State of Israel Bonds, National Campaign Cabinet, Member

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Section I (Departme	nt): (Please Print)						
Board Name: In	vestment Policy Committee			Adv	isory [X]	Not Advisory]
[X] At Large	Appointment	or	[] District	Appointment	/District #:		
Term of Appointment	Continuous Years.	From:	Date of Appoin	tment To	: Vacating	the Committee	
Seat Requirement:	Five years experience in i Local banking; securities			Se:	at #: 2		
[]*Reappoin	nhment	or	[] New App	oointment			
or [X] to comp Completion of term to ex	lete the term of Larry Za		Due to:	[X] res	ignation	[] other	
term shall be conside Section II (Applicant	eing considered for reappored by the Board of Council. (Please Print) SS EXEMPTED, MUST B	nty Commissioners	*	disclosed vo	oting conflic	ts during the pre	vious
Name: Nas	ıban	Ned			Roger		
Last Occupation/Affiliation		First		ı	Middle		
,	Shareholder [X] Eı	nployee []		Officer	[]	
Business Name:	Akerman Senterfi	tt .					
Business Address:	2424 N. Federal I	lighway, Suite 410					
City & State	Boca Raton, FL	***************************************	Zi	p Code;	33431		····
Residence Address:	6003 N.W. 23 rd W	/ay					
City & State	Boca Raton, FL		Zi	p Code:	33496		
Home Phone:	(561) 995-8599	Busin	ess Phone:	(561) 862-	4012 Ext.		
Cell Phone:	(561) 358-8230	Fax:		(561) 368-	4660		
Email Address:	ned.nashban@akerman.	com		_		,	
Mailing Address Prefer	ence: [X] Business []	Residence			•		
•	victed of a felony: Yes nature of offense, disposition	No on of case and date:					· · · · · · · · · · · · · · · · · · ·
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[] Asian-American

[] African-American [X] Caucasian

[] Native-American

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[] Hispanic-American

Section II Continued:

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Guide to the Sunshine Amenda on the web at: http://www.pal By signing below I ack County Code of Ethics.	I to read and complete training on nent prior to appointment/reappointme	tment. Article XIII, and the trainshin. Keep in mind this require lerstand, and agree to abide by Ethics training (in the manner c	ning requirement can be found ment is on-going.
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Section III (Commissioner, if a	pplicable);		

Date:

Revised 08/01/2011

Page 2 of 2

Commissioner's Signature:

Appointment to be made at BAC Meeting on:

Pursuant to Florida's Public Records Law, this document may be reviewed and photocopied by members of the public.



Ned R. Nashban



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[]*Reappoi	niment o	r [] New	Appointment	r .	
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(24573715;1)Page 1 of 2

Section Il Continued:

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	(Attach Additional S	Sheet(s), if necessary)	
See Attached Exhibit A	OR	NONE	
Guide to the Sunshine Amendm on the web at: http://www.pali By signing below I ack	to read and complete training on a tent prior to appointment/reappoint nbeachcountyethics:com/training nowledge that I have read, undend I have received the required by	ntent. Article XIII, and the train htm. Keep in mind this requiren erstand, and agree to abide by	ing requirement can be found nent is on-going. Article XIII, the Palm Beach
By wa	atching the training program on the ending a live presentation given on	Web, DVD or VIIS	VOIGH BUIGHT
	AND		
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*Applicant's Signature:	W) Brimted?	Name: Ned R. Nashban	Date: 7/26/12
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	Return this {Insert Linison Name Here}, {Ins {Insert Add	ert Department/Division Here}	
Section III (Commissioner, if ar	oplicable):		
Appointment to be made	at BCC Meeting on;		
Commissioner's Signature <	Steven Abrance &	Date:	
Pursuant to Florida's Public Records Law,	this document may be reviewed and photon	sopied by menibers of the public.	Revised 08/01/2014

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Section I (Departme	nt): (Please Print)			•
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[X] At Large	Appointment	or [] Distri	ct Appoints	nent /District #:
Term of Appointment	Continuous Years.	From: Date of App	ointment	To: Vacating the Committee
Seat Requirement:	Five years experience in investr Local banking; securities; any o	nent banking or managemen combination or experience	nt;	Seat #: 2
[]*Reappoin	atment	or [] New A	appointmen	t
or [X] to completion of term to ex	ete the term of Larry Zalkin pire on: Continuous	Due to	[X]	resignation [] other
Section II (Applicant)	red by the Board of County Co	ommissioners:	us disclose	ed voting conflicts during the prev
Name:	OOM COM			
Last Occupation/Affiliation:	SCHMIDT	First MICHAEL		Middle E
	Owner []	Employee []		Officer [X]
Business Name:	_SEACOAST NATIONA	AL BANK		
Business Address:	3001 PGA BLVD			
City & State	PLAM BEACH GARD	ENS FL	Zip Code:	33410
Residence Address:	8179 CYPRESS POINT	`RD		
City & State	WEST PALM BEACH	FL	Zip Code:	33412
Home Phone:	()	Business Phone:	. ()	Ext.
Cell Phone:	(561) 351-3670	Fax:	()	
Email Address:	GLOBALCAP@YAHOO.CC)M		
Mailing Address Prefere	nce: [] Business [X] Reside	ence		
Have you ever been conf f Yes, state the court, na	victed of a felony: Yesatture of offense, disposition of c	No X_ase and date:		
N/A_				
Minority Identification [] Native-Ame		[] Female an [] Asian-America	n []Ai	rican-American [X]Caucasian

Page 1 of 2

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Description of Services

Term

Department/Division

Ex: (R#XX-XXXX/PO XXX)	Parks & Recreation	General Maintenance	10/01/11-09/30/12
N/A	N/A	N/A	N/A
	(Attach Additio	onal Sheet(s), if necessary)	· · · · · · · · · · · · · · · · · · ·
	OR	NONE	
on the web at: http://www.pali	nbèachcountyethics.com/tra	g on Article XIII, the Palm Beach Corpointment. Article XIII, and the training.htm. Keep in mind this require understand, and agree to abide by	ining requirement can be found ement is on-going.
County Code of Ethics,	and I have received the requ	ired Ethics training (in the manner of	checked below):
X By w By at	atching the training program of tending a live presentation giv	on the Web, DVD or VHS	
	AND		
By signing below I ack Amendment & State of I	mowledge that I have read florida Code of Ethics:	d, understand and agree to abide	by the Guide to the Sunshine
*Applicant's Signature Micl	fiael E. Schmidt Pri	inted Name: <u>Michael E. Schmidt</u> I	Date: _8/24/212
Any questions and/or concerns rewebsite www.palmbeachcountyet	garding Article XIII, the Palm thics.com or contact us via em	n Beach County Code of Ethics, please nail at ethics@palmbeachcountyethics.	visit the Commission on Ethics com or (561) 233-0724.
	{Insert Liaison Name Here}	this FORM to: , {Insert Department/Division Here} Address Here)	
Section III (Commissioner, if ap	oplicable):		· .
Appointment to be made			
	Cendy & be Feley		2/12 Revised 09/01/2011

Contract/Transaction No.

Michael Schmidt, CFA

561-351-3670

Education: MBA from Loyola University of Chicago 1990, Bachelors in finance and accounting from Northern Illinois University 1987, (CFA) Chartered Financial Analyst designation.

Currently employed at as Vice President, Portfolio Manager and Trust Officer with Seacoast National Bank, a local bank with deep roots in community service

Over 25 years working in the investment industry including:

- Buy side investment security analysis of municipal bonds, US and international stocks, corporate bonds, hedge funds, private equity, FX, CDS and arbitrage evaluation
- Portfolio management: pension funds, endowments, municipalities, foundations, trusts and high net worth individuals
- Extensive Institutional consulting experience in public debt issuance and rate evaluation, investment policy development, monitoring and implementation including asset/liability for private and public pension portfolios with Mercer Consulting
- Chairing multiple investment committees who's responsibilities include investment policy oversight, monitoring and reporting
- Working in asset management as an analyst, strategist, economist and portfolio manager implementing investment strategies in accordance with investment policies
- Consulting experience with expertise in suitability, diversification, investment and credit quality along with investment performance in accordance with GIPS standards
- Current Chairperson and Arbitrator for FINRA's Dispute Resolution Board presiding over cases, testifying as an expert witness on matters of investment related cases including publication in numerous financial journals
- Graduate level instructor and exam grader for the CFA Society in economics, investment analysis, portfolio construction and finance

Board Level Experience:

PBC Financing Committee (citizen advisory)

The Children's Coalition

The Literacy Coalition

The South Florida Investment Analysts Society

The United Way Citizens Advisory Board

The DuPage County Investment Services Committee

FINRA's Dispute Resolution Board

Volunteer and Charity work

The United Way, PB and Martin County: Member of Citizens Funding Evaluation Programs, disaster preparedness volunteer, fund raising volunteer

Palm Beach County School District: member of the Listener and mentoring program, working with troubled youth in schools, coaching and mentoring

Habitat for Humanity: assisted in the construction of multiple houses in PB County since 2002 Hospice of PB County: trained volunteer assisting Hospice as needed with terminally ill patients The United Way: <u>IRS</u> trained and certified tax preparer working weekly with the VITA program providing free tax preparation and financial counseling to low income families

Lighthouse for the Blind: coordinated and hosted fund raising and awareness events

The information provided on this form will be used by County Commissioners and/or the entire Board in considering your nomination. This form MUST BE COMPLETED IN FULL. Answer "none" or "not applicable" where appropriate. Further, please attach a biography or résumé to this form.

	estment Policy Committee				Advisory [X]	Not Advisory [
[X] At Large	Appointment	or	[] Distri	ct Appoint	ment /District #:	
Term of Appointment:	Continuous Years.	From:	Date of App	ointment	To: Vacating th	e Committee
Seat Requirement:	Five years experience in inv Local banking; securities; a	estment banking ny combination o	or managemen or experience	ıt;	Seat #: 2	
[]*Reappoint	ment	or	[] New A	Appointmen	nt .	
or [X] to comple	te the term of Larry Zalk	in	Due to): [X]	resignation [] other
Completion of term to exp	ire on: Continuous					
Section II (Applicant): APPLICANT, UNLESS Name:	(Please Print) "EXEMPTED, MUST BE	A COUNTY RE.	SIDENT		•	
	SCHMIDT	First MIC	HAEL		Middle E	
Cocupation/immation.	Owner []	Eı	mployee []	· · · · · · · · · · · · · · · · · · ·	Officer [X]
Business Name:	SEACOAST NATIO	ONAL BANK				
Business Address:	3001 PGA BLVD					
		דת מונים מו		7in Coda	33410	
City & State	PLAM BEACH GA	RDENS FL	····	Zip Code:	33410	
	PLAM BEACH GA 8179 CYPRESS PO			zip Code:	33410	
Residence Address:		INT RD		Zip Code: Zip Code:	33412	
Residence Address: City & State	8179 CYPRESS PO	INT RD CH FL				
City & State Residence Address: City & State Home Phone: Cell Phone:	8179 CYPRESS PO	INT RD CH FL			33412 Ext.	
Residence Address: City & State Home Phone: Cell Phone:	8179 CYPRESS PO WEST PALM BEAC	INT RD CH FL Busin Fax:			33412 Ext.	
Residence Address: City & State Home Phone: Cell Phone: Email Address:	8179 CYPRESS PO WEST PALM BEAC () (561) 351-3670	INT RD CH FL Busin Fax: COM			33412 Ext.	
Residence Address: City & State Home Phone: Cell Phone: Email Address: Mailing Address Preference Have you ever been convi	8179 CYPRESS POI WEST PALM BEAC () (561) 351-3670 GLOBALCAP@YAHOO.	ONT RD CH FL Busin Fax: COM sidence	ness Phone:	Zip Code:()	33412 Ext.	
Residence Address: City & State Home Phone: Cell Phone: Email Address: Mailing Address Preference Have you ever been convi	8179 CYPRESS POR WEST PALM BEACT () () () () () () () () () (ONT RD CH FL Busin Fax: COM sidence	ness Phone:	Zip Code:()	33412 Ext.	

transactions that do not exceed \$500 per year in aggregate. These exemptions are described in the Code. This prohibition does not apply When the advisory board member's board provides no regulation, oversight, management, or policy-setting recommendations regarding the subject contract or transaction and the contract or transaction is disclosed at a public meeting of the Board of County Commissioners. To determine compliance with this provision, it is necessary that you, as a board member applicant, identify all contractual relationships between Palm Beach County government and you as an individual, directly or indirectly, or your employer or business. This information should be provided in the space below. If there are no contracts or transactions to report, please verify that none exist. Staff will review this information and determine if you are eligible to serve or if you may be eligible for an exception or waiver pursuant to the code. Contract/Transaction No. Department/Division **Description of Services Term** Ex: (R#XX-XXXX/PO XXX) Parks & Recreation General Maintenance 10/01/11-09/30/12 __ N/A __ N/A N/A (Attach Additional Sheet(s), if necessary) NONE All board members are required to read and complete training on Article XIII, the Palm Beach County Code of Ethics, and read the Guide to the Sunshine Amendment prior to appointment/reappointment. Article XIII, and the training requirement can be found on the web at: http://www.palmbeachcountyethics.com/training.htm. Keep in mind this requirement is on-going. By signing below I acknowledge that I have read, understand, and agree to abide by Article XIII, the Palm Beach County Code of Ethics, and I have received the required Ethics training (in the manner checked below): By watching the training program on the Web, DVD or VHS By attending a live presentation given on _____ By signing below I acknowledge that I have read, understand and agree to abide by the Guide to the Sunshine Amendment & State of Florida Code of Ethics: *Applicant's Signature: Michael E. Schmidt Printed Name: Michael E. Schmidt Date: 8/24/212 Any questions and/or concerns regarding Article XIII, the Palm Beach County Code of Ethics, please visit the Commission on Ethics website www.palmbeachcountyethics.com or contact us via email at ethics@palmbeachcountyethics.com or (561) 233-0724. Return this FORM to: {Insert Liaison Name Here}, {Insert Department/Division Here} (Insert Address Here) Section III (Commissioner, if applicable): Appointment to be made at BCC Meeting on:

Revised 08/01/2011

CONTRACTUAL RELATIONSHIPS: Pursuant to Article XIII, Sec. 2-443 of the Palm Beach County Code of Ethics, advisory board members are prohibited from entering into any contract or other transaction for goods or services with Palm Beach County. Exceptions to this prohibition include awards made under sealed competitive bids, certain emergency and sole source purchases, and

Commissioner's Signature.

Pursuant to Florida's Public Records Law, this document may be reviewed and photocopied by members of the public.

Michael Schmidt, CFA

561-351-3670

Education: MBA from Loyola University of Chicago 1990, Bachelors in finance and accounting from Northern Illinois University 1987, (CFA) Chartered Financial Analyst designation.

Currently employed at as Vice President, Portfolio Manager and Trust Officer with **Seacoast National Bank**, a local bank with deep roots in community service

Over 25 years working in the investment industry including:

- Buy side investment security analysis of municipal bonds, US and international stocks, corporate bonds, hedge funds, private equity, FX, CDS and arbitrage evaluation
- Portfolio management: pension funds, endowments, municipalities, foundations, trusts and high net worth individuals
- Extensive Institutional consulting experience in public debt issuance and rate evaluation, investment policy development, monitoring and implementation including asset/liability for private and public pension portfolios with Mercer Consulting
- Chairing multiple investment committees who's responsibilities include investment policy oversight, monitoring and reporting
- Working in asset management as an analyst, strategist, economist and portfolio manager implementing investment strategies in accordance with investment policies
- Consulting experience with expertise in suitability, diversification, investment and credit quality along with investment performance in accordance with GIPS standards
- Current Chairperson and Arbitrator for FINRA's Dispute Resolution Board presiding over cases, testifying as an expert witness on matters of investment related cases including publication in numerous financial journals
- Graduate level instructor and exam grader for the CFA Society in economics, investment analysis, portfolio construction and finance

Board Level Experience:

PBC Financing Committee (citizen advisory)

The Children's Coalition

The Literacy Coalition

The South Florida Investment Analysts Society

The United Way Citizens Advisory Board

The DuPage County Investment Services Committee

FINRA's Dispute Resolution Board

Volunteer and Charity work

The United Way, PB and Martin County: Member of Citizens Funding Evaluation Programs, disaster preparedness volunteer, fund raising volunteer

Palm Beach County School District: member of the Listener and mentoring program, working with troubled youth in schools, coaching and mentoring

Habitat for Humanity: assisted in the construction of multiple houses in PB County since 2002 Hospice of PB County: trained volunteer assisting Hospice as needed with terminally ill patients The United Way: IRS trained and certified tax preparer working weekly with the VITA program providing free tax preparation and financial counseling to low income families

Lighthouse for the Blind: coordinated and hosted fund raising and awareness events