

PALM BEACH COUNTY  
BOARD OF COUNTY COMMISSIONERS

BOARD APPOINTMENT SUMMARY

Meeting Date: July 22, 2014

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 for the unexpired term of Joseph Hill, which expires September 30, 2016.

<u>Nominee</u>	<u>Seat No.</u>	<u>Nominated By</u>
Michael Schmidt	3	Commissioner Santamaria
	OR	
Larry Zalkin	3	Commissioner Berger
	OR	
Robert Earl Wilkins, Jr.	3	Commissioner Taylor

**Summary:** Joseph Hill 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 Valeche currently serves as the Board's representative and as the Committee's Chairman.

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 Joseph Hill vacated his seat on the Committee, it now needs to be filled. Of the seats currently filled four (4) are white males (66.6%), one (1) black male (16.7%) and one (1) white female (16.7%).

**Attachments:**

1. Applications with résumés.

Recommended by: *Glennette Blanes* 7/3/14  
 Department Director Date

Legal Sufficiency: *Paul F. [Signature]* 7/3/14  
 Assistant County Attorney Date

**PALM BEACH COUNTY  
BOARD OF COUNTY COMMISSIONERS  
BOARDS/COMMITTEES APPLICATION**

*The information provided on this form will be used in considering your nomination. Please COMPLETE SECTION II IN FULL. Answer "none" or "not applicable" where appropriate. Please attach a biography or résumé to this form.*

**Section I (Department): (Please Print)**

Board Name: Investment Policy Committee Advisory  Not Advisory   
 At Large Appointment or  District Appointment /District #: \_\_\_\_\_  
Term of Appointment: \_\_\_\_\_ Years. From: TBD To: 09/30/2016  
Seat Requirement: Private Sector Seat #: \_\_\_\_\_  
 \*Reappointment or  New Appointment

or  to complete the term of Joseph Hill Due to:  resignation  other  
Completion of term to expire on: 09/30/2016

\*When a person is being considered for reappointment, the number of previous disclosed voting conflicts during the previous term shall be considered by the Board of County Commissioners: \_\_\_\_\_

**Section II (Applicant): (Please Print)**

**APPLICANT, UNLESS EXEMPTED, MUST BE A COUNTY RESIDENT**

Name: Schmidt Michael E  
Last First Middle  
Occupation/Affiliation: Sr. Portfolio Manager  
Owner  Employee  Officer   
Business Name: Seacoast Bank  
Business Address: 3001 PGA Blvd  
City & State Palm Beach Gardens FL Zip Code: 33410  
Residence Address: 8179 Cypress Point Rd.  
City & State West Palm Beach, FL Zip Code: 33412  
Home Phone: ( 561 ) 389-5139 Business Phone: ( 561 ) 351-3670 Ext. \_\_\_\_\_  
Cell Phone: 561-351-3670 Fax: ( )  
Email Address: Michael.schmidt@seacoastnational.com

Mailing Address Preference:  Business  Residence

Have you ever been convicted of a felony: Yes \_\_\_\_\_ No

If Yes, state the court, nature of offense, disposition of case and date: \_\_\_\_\_

Minority Identification Code:  Male  Female  
 Native-American  Hispanic-American  Asian-American  African-American  Caucasian

Section II 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 sealed 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.

<u>Contract/Transaction No.</u>	<u>Department/Division</u>	<u>Description of Services</u>	<u>Term</u>
Example: (R#XX-XX/PO XX)	Parks & Recreation	General Maintenance	10/01/00-09/30/2100
_____	_____	_____	_____
_____	_____	_____	_____
(Attach Additional Sheet(s), if necessary) OR			
NONE	x	NOT APPLICABLE/ (Governmental Entity)	<input type="checkbox"/>

**ETHICS TRAINING:** All board members are required to read and complete training on Article XIII, the Palm Beach County Code of Ethics, and read the State Guide to the Sunshine Amendment, Article XIII, and the training requirement can be found on the web at: <http://www.palmbeachcountylethics.com/training.htm>. Ethics training is on-going, and pursuant to PPM CW-P-80 is required before appointment, and upon reappointment.

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 on May 21 2014  
 By attending a live presentation given on \_\_\_\_\_, 20\_\_\_\_

**AND**

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: 5/21/2014

Any questions and/or concerns regarding Article XIII, the Palm Beach County Code of Ethics, please visit the Commission on Ethics website [www.palmbeachcountylethics.com](http://www.palmbeachcountylethics.com) or contact us via email at [ethics@palmbeachcountylethics.com](mailto:ethics@palmbeachcountylethics.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:

Commissioner's Signature: *John D. Santanami* Date: 5/21/14

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

Revised 01/14/2014

## **Michael Schmidt, CFA**

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

### **Current and previous advisory board positions on professional and charitable boards:**

The Palm Beach County Financing Committee  
The Children's Coalition  
The Literacy Coalition  
The South Florida Investment Analysts Society  
The United Way Citizens Advisory Panel  
The DuPage County Investment Services Committee  
FINRA's Dispute Resolution Board

### **Volunteer Work:**

- United way, VITA program, certified tax preparer for low to moderate income families preparing 60-70 returns each year
- United Way, emergency preparedness training drill coordinator
- Habitat for Humanity, having worked on numerous crews since 2005 on site construction
- Fund raiser Lymphoma / Leukemia society and a Cancer Survivor

### **Professional/ Teaching/educational:**

- 28 years employment in the investment management and consulting field, investment policy, asset allocation, security analysis and portfolio management primarily in fixed income

- CFA curriculum instructor over 10 years teaching accounting, finance, economics, fixed income, investment policy and asset allocation
- CFA exam volunteer since 2003
- Published research reports and articles in numerous publications

Currently employed as analyst and Sr. Investment Officer at Seacoast National Bank, a Local community bank with deep roots in community service

**Over 25 years working in the investment industry including:**

- extensive experience in investment policy development, monitoring and implementation at the institutional level including asset/liability work with pension funds and insurance company portfolios
- chairing investment committees who's responsibilities include investment policy oversight 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

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**Section I (Department): (Please Print)**

Board Name: Investment Policy Committee Advisory  Not Advisory

At Large Appointment or  District Appointment / District #: \_\_\_\_\_

Term of Appointment: 3 Years. From: \_\_\_\_\_ To: \_\_\_\_\_

Seat Requirement: Experience in investment banking; securities; investment management; banking or any combination for 5 or more years. Seat #: 3

\*Reappointment or  New Appointment

or  to complete the term of Joseph D. Hill, Jr. Due to:  resignation  other

Completion of term to expire on: September 30, 2016

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**Section II (Applicant): (Please Print)**

**APPLICANT, UNLESS EXEMPTED, MUST BE A COUNTY RESIDENT**

Name: ZALKIN LARRY  
Last First Middle

Occupation/Affiliation: RETIRED  
Owner  Employee  Officer

Business Name: \_\_\_\_\_

Business Address: \_\_\_\_\_

City & State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Residence Address: 7204 FRANCISCO BEND DRIVE

City & State: DELRAY BEACH, FL Zip Code: 33446

Home Phone: ( ) 561-498-0740 Business Phone: ( ) Ext. \_\_\_\_\_

Cell Phone: ( ) 561-252-1475 Fax: ( )

Email Address: LZALKINC AOL.COM

Mailing Address Preference:  Business  Residence

Have you ever been convicted of a felony: Yes \_\_\_\_\_ No   
If Yes, state the court, nature of offense, disposition of case and date: \_\_\_\_\_

Minority Identification Code:  Male  Female  
 Native-American  Hispanic-American  Asian-American  African-American  Caucasian

Section II Continued:

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Example: (R#XX-XX/PO XX)	Parks & Recreation	General Maintenance	10/01/00-09/30/2100
_____	_____	_____	_____
_____	_____	_____	_____

(Attach Additional Sheet(s), if necessary)

OR

NONE

NOT APPLICABLE/  
(Governmental Entity)

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 By attending a live presentation given on \_\_\_\_\_, 20\_\_\_\_

AND

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: Larry Zalkin Printed Name: LARRY ZALKIN Date: 5/27/2014

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](http://www.palmbeachcountyethics.com) or contact us via email at [ethics@palmbeachcountyethics.com](mailto:ethics@palmbeachcountyethics.com) or (561) 233-0724.

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 {Insert Address Here}

**Section III (Commissioner, if applicable):**

Appointment to be made at BCC Meeting on: \_\_\_\_\_

Commissioner's Signature: Mary Lee Berger Date: \_\_\_\_\_

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Revised 01/14/2014

## LARRY ZALKIN

7204 Francisco Bend Drive • Delray Beach, FL 33446 • 561.498.0740 • [lzalkin@aol.com](mailto:lzalkin@aol.com)

### PROFILE

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Accomplished executive with diversified entrepreneurial, financial and managerial expertise utilized in a variety of changing environments. Particular strength in the following disciplines:

Financial Management   Operational Management   Team Building  
Strategic Planning   Mergers and Acquisitions

### EMPLOYMENT

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**MORGAN STANLEY, Boca Raton, FL**

*Financial Advisor*

**2012–2013**

**MERRILL LYNCH WEALTH MANAGEMENT, Boca Raton, FL**

*Financial Advisor*

**2009 –2012**

The positions required the sourcing of prospective clients, capitalizing on referrals, and assessing client needs based on their objectives, resources, time horizon, risk profile and preferences. Highly customized solutions are prepared to meet the client's needs with recommendations for suitable products including stocks, bonds, options, mutual funds and annuities.

**WESCOTT FINANCIAL ADVISORY GROUP LLC, Palm Beach, FL**

*Director, Client Development*

**2002 – 2009**

Financial advisory affiliate of national law firm providing financial planning and investment advisory services to individuals, trusts, foundations and retirement plans; the firm has over \$1.0 billion under management. Position is responsible for formulating, implementing and coordinating all firm marketing activities including the identification and evaluation of prospective clients and the initiation of actions to achieve their engagement as clients. The position requires both analytical and communication skills and reports to the president and CEO.

**HUDSON BAY ENVIRONMENTS / STEELCASE INC. Bronx, NY**

*Controller / Consultant*

**2001-2002**

Consulting engagement initiated by Steelcase Corporation's finance subsidiary to stabilize and reorganize financial affairs of this privately owned Steelcase office furniture dealer.



**A. POMERANTZ & COMPANY, Philadelphia, PA****1998-2001*****Executive Vice President and Treasurer & Chief Financial and Administrative Officer***

This privately owned enterprise sells Steelcase office furniture and ancillary design, asset management and maintenance services to Fortune 500 companies, universities, medical institutions and professional service firms. Its 77 employees, operating from two facilities, generated \$36.8 million in revenues in 1999. Responsible for introducing and directing the implementation of financial, administrative, sales and operational management techniques and measuring their effectiveness. Direct responsibility for Finance and Administrative Group and Operations Group.

**QUAKER HOLDING COMPANY, INC., Santa Barbara, CA****1995-1998*****Vice President & Chief Financial Officer***

This privately owned enterprise has a diversified portfolio of 15 operating companies located throughout the United States and Europe and primarily concentrated in the energy industry and the airplane maintenance and modification industry. Responsible for implementing financial and operational management disciplines, restructuring existing portfolio of assets into logical and profitable business units with enhanced debt capacity, and coordinating, developing and implementing activities in the former Soviet Union.

**O'BRIEN ENVIRONMENTAL ENERGY, INC., Philadelphia, PA****1994*****President & Chief Operating Officer***

This former American Stock Exchange listed company develops and operates cogeneration and biogas projects that produce electricity and thermal energy for sale to industry and commercial users and public utilities. Its 183 employees and six primary subsidiaries generated \$97.7 million in revenues during its 1993 fiscal year. Provided counsel to senior management and Board of Directors in formulating strategic, financial, operating and marketing objectives. Represented the company with all constituencies including customers, suppliers, financial institutions, the American Stock Exchange, bondholders and stockholders.

**WESTMORELAND COAL COMPANY, Philadelphia, PA****1969-1993*****Executive Vice President and Chief Financial & Administrative Officer*****1990-1993*****Senior Vice President and Chief Financial Officer*****1988-1990**

The principal business of this former Fortune 500, New York Stock Exchange-listed company is the marketing of coal on a worldwide basis to electric utilities and the steel industry. Its 1,110 employees produced and marketed 16.7 million tons in 1993 valued at \$465.3 million. Provided counsel to senior management in developing strategic and operating objectives and in resolving operational issues. Directed and coordinated the formulation of financial, administrative, human resources, insurance and investor relations practices and policies. Member of Total Quality Management steering committee and project team mentor. Position had a staff of 56 with a combined payroll of \$2.7 million

***Vice President-Administrative (Westmoreland Coal Sales Company)*****1980-1988**

Provided counsel to subsidiary President with respect to marketing, financial and human resources issues. Direct responsibility for market research, planning, distribution and transportation, coal brokerage, contract administration, finance and credit and collection functions.

***Treasurer***

1975-1980

Responsible for capital and financial planning, investment policy and monitoring of pension plans, shareholder relations, cash management, credit and collections, payroll, commercial and investment banking relationships, negotiation and compliance monitoring of credit facilities including private placement, revolving term loans and leveraged leases.

***Assistant Vice President & Tax Manager***

1969-1975

Responsible for tax and government compliance requirements.

**U.S. TREASURY DEPARTMENT, Philadelphia, PA**

1966-1969

***Internal Revenue Service Field Agent*****EDUCATION AND CERTIFICATIONS**

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**Temple University, Philadelphia, PA**

B.S., Accounting and Economics

**Securities Industry (FINRA)**

Series 7

Series 63

Series 65

**Florida Insurance License**

2-15 License (Life, Health and Variable Annuity)

**Chartered Retirement Plan Counselor®****Certified Special Needs Advisor**

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Name: Wilkins, Jr. Robert Earl  
Last First Middle

Occupation/Affiliation: Government Banking Manager - Florida  
Owner  Employee  Officer

Business Name: TD Bank

Business Address: 2130 Centrepark West Drive, 2<sup>nd</sup> Floor

City & State: West Palm Beach FL Zip Code: 33409

Residence Address: 4305 Heath Circle N.

City & State: West Palm Beach FL 33407 Zip Code: 33407

Home Phone: (561) 478-7721 Business Phone: (561) 352-2143 Ext.

Cell Phone: (561) 312-4313 Fax: (561) 352-2095

Email Address: wilkinbam@bellsouth.net

Mailing Address Preference:  Business  Residence

Have you ever been convicted of a felony: Yes \_\_\_\_\_ No

If Yes, state the court, nature of offense, disposition of case and date: \_\_\_\_\_

Minority Identification Code:  Male  Female  
 Native-American  Hispanic-American  Asian-American  African-American  Caucasian

Section II Continued:

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<u>Example: (R#XX-XX/PO XX)</u>	<u>Parks &amp; Recreation</u>	<u>General Maintenance</u>	<u>10/01/00-09/30/2100</u>
_____	<u>Finance</u>	<u>Bank Deposit Accounts</u>	<u>1 to 10 years</u>

(Attach Additional Sheet(s), if necessary)  
OR

NONE

NOT APPLICABLE/  
(Governmental Entity)

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**AND**

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: [Signature] Printed Name: Robert Wilkins Date: 5-20-14

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{Insert Liaison Name Here}, {Insert Department/Division Here}  
{Insert Address Here}

**Section III (Commissioner, if applicable):**

Appointment to be made at BCC Meeting on: \_\_\_\_\_

Commissioner's Signature: [Signature]

Date: 5/20/14

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Revised 01/14/2014

## Robert Wilkins BIO



Robert E. Wilkins, Jr., is TD Bank's Vice President, Florida Government Banking Manager, based in West Palm Beach. Robert is responsible for the growth of TD Bank's Florida government banking line of business and management of the government banking relationship development team. Robert's team of Government Banking Officers operate from offices in Ft Lauderdale, Orlando and Jacksonville.

Robert has 30 years of commercial banking experience. During the past 20 years he has managed large government relationships in Palm Beach, Martin, Miami-Dade, Broward, Volusia and Brevard counties. Prior to joining TD Bank, he served as a Senior Vice President in Treasury Management at both Wells Fargo Bank and Bank of America. He earned the Association for Finance Professionals lifetime Certified Cash Manager (CCM) designation in 1993.

A West Palm Beach resident, Wilkins received an MBA in 1985 from Samford University in Birmingham, Ala., and a B.S. degree in finance from Florida A & M University – Tallahassee FL in 1979.

### Professional Highlights

- Gold Coast Treasury Management Association, former VP
- Palm Beach County School District – Adult Education Center Advisory Board, former board member
- South Florida Chapter - FGFOA, Associate Member
- Palm Beach County Chapter – FGFOA, Associate Member
- Suncoast Chamber of Commerce, former board member
- Al Tatum Little League Baseball – Volunteer Coach & Board Member