

PALM BEACH COUNTY
BOARD OF COUNTY COMMISSIONERS

BOARD APPOINTMENT SUMMARY

Meeting Date: August 23, 2022
Department: Office of Financial Management and Budget
Advisory Board: Investment Policy Committee

I. EXECUTIVE BRIEF

Motion & Title: Staff recommends motion to: approve the appointment of two members to the Investment Policy Committee for a three (3) year term.


<u>Nominee</u>	<u>Term</u>	<u>Nominated By</u>
Robert Deviney	10/1/22 – 9/30/25	Vice Mayor Weiss
<i>or</i>		
Johnny Ortiz	10/1/22 – 9/30/25	Commissioner Kerner
<i>or</i>		
Robert Rubin	10/1/22 – 9/30/25	Mayor Weinroth

Summary: The Investment Policy Committee is comprised of seven (7) members, with four (4) being at-large appointments by the Board of County Commissioners (BCC), one being a representative appointed by the Sheriff, a member appointed from OFMB by the County Administrator, and the Chair being a member of the BCC, currently Vice Mayor Weiss. Of the seats currently filled the diversity count is: three (3) Caucasian males (60%), and two (2) Caucasian females (40%). The gender ratio (male:female) is 3:2. Nominees Mr. Deviney and Mr. Rubin are Caucasian males, and Mr. Ortiz is a Hispanic male. Countywide (DB)

Background and Justification: Per Section 2-41(c)(6) of the Palm Beach County Code of Ordinances, 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.

Attachments:

Application (including résumé)

Recommended by:  8/5/2022
Department Director Date

Legal Sufficiency:  8/8/2022
Assistant County Attorney Date

II. REVIEW COMMENTS

A. Other Department Review:

Department Director

**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: 3 Years. From: 10/01/19 To: 09/30/2022

Seat Requirement: Experience in investment, banking or securities community; investment management; related legal experience; or any combination thereof Seat #: 5

*Reappointment or New Appointment

or to complete the term of Mark A. Parks, Jr. Due to: resignation other
Completion of term to expire on: 09/30/2022

*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: Deviney Robert "Britt"
Last First Middle

Occupation/Affiliation: Financial Planner

Owner Employee Officer

Business Name: DBA: Bencor

Business Address: 301 W. Atlantic Av.

City & State: Delray Beach Zip Code: 33444

Residence Address: 410 E venia St. # 201

City & State: WPB FL Zip Code: 33401

Home Phone: () Business Phone: () Ext. _____

Cell Phone: (61) 329-2632 Fax: () _____

Email Address: _____

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

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

NONE



NOT APPLICABLE/
(Governmental Entity)




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.palmbeachcountyethics.com/training.htm>. Ethics training is on-going, and pursuant to PPM CW-P-79 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 6-18, 19 20 22
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:  Printed Name: Brett Deviney Date: 6-30-22

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) 355-1915.

Return this FORM to:
Irwin L Jacobowitz, J.D., OFMB/CDC
301 N. Olive Ave., #702.211, West Palm Beach, FL 33401

Section III (Commissioner, if applicable):

Appointment to be made at BCC Meeting on: _____

Commissioner's Signature: _____ Date: _____

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

Revised 02/01/2016

Irwin Jacobowitz

From: Britt Deviney <brittdeviney@aol.com>
Sent: Thursday, August 04, 2022 6:01 PM
To: Irwin Jacobowitz
Subject: Re: application

***** Note: This email was sent from a source external to Palm Beach County. Links or attachments should not be accessed unless expected from a trusted source. *****

R. Britt Deviney

Independent Financial Planner
410 Evernia St #201
WPB FL, 33401
Tel: 561-329-2632
E-Mail brittdeviney@gmail.com

Britt Deviney is a 3rd generation native Floridian born in WPB at Good Samaritan Hospital. He attended public schools locally before entering the US Army where he achieved the position of Tank Commander in Delta company of the 1/33 Armor Cavalry regiment attached to 9th Infantry Division Ft Lewis where he served under General Schwarzkopf with a primary role of desert warfare tactics.

After separating from service, he used the Montgomery GI Bill to attend Elon University where he received his BA in Corporate Communications and a minor in European history and business administration. He utilized the study abroad programs where he studied mathematics at Cambridge University in England and central American politics at The University of the Americas in San Jose, Cost Rica.

Britt entered the financial services field in 1998 with AIG / Valic where after years of experience he managed the State of Florida ORP plan at Florida Atlantic University for about 7 years. He then repositioned to AXA Equitable for another 9 years where he worked with the state of Florida FRS participants utilizing pension max strategies along with investment products that best fit client needs. After realizing that corporations were more concerned with what was best for them and not the individual client, he decided to branch out on his own as independent advisor where he has been for the last 5 years. He is very experienced with the State of Florida FRS, managing 401-k's ,403-b , 401-a, 457dc retirement plans.

Britt's wife of 17 years is Dorothy Jacks, where they share a cat named Oscar.

His hobbies include traveling, SCUBA diving where he holds the title of Instructor and Dive Master, collecting rare bourbons, sporting clay's, giving presentations about WW2 history to groups of all sizes, collecting military artifacts, studying history from the location it happened and is currently working on obtaining his boat, captains license.

Leadership positions

Leadership Palm Beach County class of 2005 President
Rotary WPB President 2021-2022 active 14 years
Founding member of Leadership business council
AMI for Kids, Board VP
Together for Life, Board member
Boy Scouts of America, Board member

Junior Achievement, teacher
American Cancer Society, board member

Personal and business accolades can be provided upon request

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

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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: 10/01/19 To: 09/30/22

Seat Requirement: Experience in investment, banking or securities community; investment management; related legal experience; or any combination thereof Seat #: _____

*Reappointment or New Appointment

or to complete the term of Mark A. Parks, Jr. Due to: resignation other

Completion of term to expire on: 09/30/22

*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: Ortiz Sommy
Last First Middle

Occupation/Affiliation: Serving as citizen of P.B. County
Owner Employee Officer

Business Name: N/A

Business Address: _____

City & State _____ Zip Code: _____

Residence Address: 16790 East Gwms Drive

City & State Loxahatchee FL Zip Code: 33470

Home Phone: () - Business Phone: () - Ext.

Cell Phone: 661 719-2020 Fax: ()

Email Address: Ortiz.J.H.28@gmail.com

Mailing Address Preference: Business Residence

Have you ever been convicted of a felony: Yes _____ No X
If Yes, state the court, nature of offense, disposition of case and date: N/A

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
<u>N/A</u>			

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

NONE

NOT APPLICABLE/
(Governmental Entity)

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.palmbeachcountyethics.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 FALL OF 2022
By attending a live presentation given on _____, 2022

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: John Cortez Sr Date: July 15, 2022

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:

Irwin L. Jacobowitz, J.D., OFMB/CDC
301 N. Olive Ave., #702.211, West Palm Beach, FL 33401

Section III (Commissioner, if applicable):

Appointment to be made at BCC Meeting on:

Commissioner's Signature: [Signature]

Date: 7-19-22

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

Revised 01/14/2014

Articulate & Take-Charge Visionary Providing Value-Based Solutions to Global Clientele

Dynamic and entrepreneurial leader offering extensive experience in law enforcement and educational instruction at multiple top-rated institution, paired with strong foundations and licensing in commercial real estate and property development. A widely respected change catalyst, leveraging a proven track record of exceeding operational business objectives and leading cross-functional teams in the face of challenges and roadblocks.

Leverages subject matter expertise in global trade and international business to effectively synthesize information from a diverse range of sources to develop integrated, client-focused solutions. Able to quickly gain trust, confidence, and respect with clients and peers in all segments of the business community, combining core real estate knowledge with an expansive set of highly transferrable skills and experience excelling in all multidisciplinary assignments.

CORE SKILLS & COMPETENCIES

- Stakeholder Engagement
- Market & Trend Analysis
- Recruitment Lifecycle
- Value-Based Due Diligence
- Property Development & Management
- Negotiations & Conflict Resolution
- Team Development & Leadership
- Operations & Resource Management
- Client Relations & Retention
- Regulatory Compliance
- Strategic & Tactical Planning
- Risk Analysis & Mitigation

CAREER SYNOPSIS

Sheriff Commander, City of South Bay, FL <i>Palm Beach County Sheriff's Office</i>	1995 – Present
Security Liaison, Florida Crystal Corp. (Contract) <i>Palm Beach County Sheriff's Office</i>	
Detective Sergeant, Enforceable Writs Unit <i>Palm Beach County Sheriff's Office</i>	
Security Liaison, Chief Judge of the Fifteenth Judicial Circuit <i>Palm Beach County Sheriff's Office</i>	
Financial Crimes Detective <i>Palm Beach County Sheriff's Office</i>	
International Money Laundering & Organized Crime Agent <i>Palm Beach County Sheriff's Office</i>	
Hostage Negotiator <i>Palm Beach County Sheriff's Office</i>	
Police Officer <i>City of Delray Beach Police Department</i>	1989-1995
Faculty: <i>Northwood University</i> <i>Nova Southeastern University</i>	
Adjunct Professor, Management, Marketing & Strategic Planning <i>Northwood University</i>	2001 – 2015
Adjunct Professor, International Marketing <i>Nova Southeastern University</i>	2006 – 2007

AREAS OF EXPERTISE

- **Negotiation & Conflict Resolution:** Actively listens and assesses inconsistencies and deception in body language, speech patterns, and eye movement in high-stakes situations to efficiently mitigate, deescalate or resolve conflicts as required.
- **Cross-Functional Leadership:** Employs extensive leadership and strategic planning expertise, directing end-to-end budget development, tactical planning, and performance management for up to 350 multidisciplinary personnel.
- **Stakeholder Engagement:** Leverages exemplary interpersonal skill to engage with multidisciplinary stakeholders from front-line personnel to municipal leaders and executive clients, utilizing psychologically-backed techniques to effectively identify key stakeholder needs and behavioural motivators to better inform strategic decision-making.
- **Relationship Building:** Maintains reputation as a widely respected liaison with numerous high net-worth clients and other multidisciplinary stakeholders including financial, engineering, and legal partners. Offers a consistently genuine and consultative approach to drive value-based client trust and align varying objectives to cohesive plans.

AREAS OF EXPERTISE (CONTINUED)

- **Risk Mitigation:** Evaluates civil engineering plans in close collaboration with other cross-functional subject matter experts to proactively develop mitigation strategies for any identified risks or roadblocks.
- **Client Solutions:** Expertly researches, analyzes, and synthesizes information to develop innovative, alternative client solutions based on extensive industry expertise and proven understanding of local area trends.
- **Subject Matter Expertise:** As a highly influential speaker, actively functions as go-to resource for judges, corporate leaders, and policy makers at local, state, and federal levels, regularly providing testimony on various offshore banking and international money laundering cases.
- **Property Development:** Drew on forward-thinking nature to oversee end-to-end property development process from raising initial capital and preparing development plans to recruiting and managing 90+ multidisciplinary tradespeople to complete a full-scale home construction from land development to final product.

PROFESSIONAL DEVELOPMENT

Introduction to Commercial Real Estate Investment <i>Gold Coast Schools</i>	2020
Financial and Investment Analysis for Commercial Real Estate <i>Gold Coast Schools</i>	2020
Insider’s Guide to Building Wealth with Commercial Real Estate <i>Gold Coast Schools</i>	2019
Real Estate Sales Associate License <i>Department of Business & Professional Regulation – Florida</i>	2019

Relevant Course Topics: Commercial Real Estate as a Business | Commercial Property Types & Office Properties | Retail Properties | Commercial Real Estate as an Investment | Market Analysis for Commercial Real Estate | Establishing Investment Objectives | Property & Market Selection | Acquiring Property | Building Wealth

Sampling of Skills Acquired:

- **Commercial Real Estate:** Developed familiarity with core commercial real estate foundations including types of commercial real estate, how real estate transactions work, understanding P&L statements, and various types of market analysis.
- **Commercial Investment:** Discussed essential commercial investment topics including opportunities in the commercial industry, trends impacting commercial real estate, measurement standards for buildings, property revenue structuring, and the role markets play in investment decision-making.
- **Market Cycles:** Developed foundational understanding of proven commercial real estate best practices, examining how markets and market cycles factor into real estate investment strategy development, as well as core buying and due diligence practices.

Culminating Case Study Assignment

Reviewed instructor-provided data to identify current and projected market positions, as well as potential change indicators to inform possible investment opportunities for final presentation to instructor.

FORMAL EDUCATION

Master of Business Administration, Marketing Specialization <i>Nova Southeastern University</i>	2005
Master in Business Administration <i>Nova Southeastern University</i>	2001
Bachelor of Business Administration, Management <i>Northwood University</i>	1999
Associate Degree, Business Administration <i>Northwood University</i>	1997

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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: 07/14/20 To: 09/30/2023

Seat Requirement: Experience in investment, banking or securities community; Investment management; related legal experience; or any Combination thereof Seat #: 3

*Reappointment or New Appointment

or to complete the term of Lawrence Jean-Louis Due to: resignation other

Completion of term to expire on: 09/30/2023

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Section II (Applicant): (Please Print)

APPLICANT, UNLESS EXEMPTED, MUST BE A COUNTY RESIDENT

Name: Rubin Robert
Last First Middle

Occupation/Affiliation: President
Owner Employee Officer

Business Name: Rubin Wealth Advisors

Business Address: 1200 N. Federal Highway Suite 200

City & State Boca Raton Zip Code: 33431

Residence Address: 3900 NW 23 Terr

City & State Boca Raton Zip Code: 33431

Home Phone: () Business Phone: (561) 288-1111 Ext. _____

Cell Phone: (561) 762-7009 Fax: ()

Email Address: bob@rubinwa.com

Mailing Address Preference: Business Residence

Have you ever been convicted of a felony: Yes _____ No X

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 <input type="checkbox"/>		NOT APPLICABLE/ (Governmental Entity) <input type="checkbox"/>	

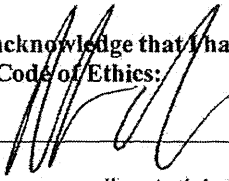
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 By attending a live presentation given on _____, 20____

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:  Printed Name: Robert Rubin Date: 7/18/22

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) 355-1915.

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 Irwin L Jacobowitz, J.D., OFMB/CDC
 301 N. Olive Ave., #702.211, West Palm Beach, FL 33401

Section III (Commissioner, if applicable):

Appointment to be made at BCC Meeting on:

Commissioner's Signature:  Date: 7/19/22

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

Revised 01/14/2014

Irwin Jacobowitz

From: Bob Rubin <Bob@rubinwa.com>
Sent: Tuesday, July 19, 2022 1:01 PM
To: Irwin Jacobowitz; Lucia Bonavita; Cindy Beaudreau
Subject: RE: Investment Policy Committee Requested BIO

***** Note: This email was sent from a source external to Palm Beach County. Links or attachments should not be accessed unless expected from a trusted source. *****

Bob Rubin, CLU, ChFC has been a trusted leader in the financial services industry for more than 35 years. He is a national speaker and media expert on estate planning, wealth transfer, and wealth strategies. Specializing in the design and implementation of advanced wealth planning strategies for families, executives and entrepreneurs, Bob and his team help clients navigate the complexities of investment management and financial planning to chart stronger financial futures.

Financial strategist, connector, problem-solver and always a trusted advisor, Bob's financial acumen and integrity have earned the respect of leaders in business, finance, government and, most importantly, his clients.

"I'm a problem-solver, always excited to face the next challenge. Finances are complicated — more so for business owners and wealthy families. Not only do business owners worry about their personal wealth and welfare, but also that of their staff," Bob said. "I help navigate the ever-increasing complexities of investment management and financial planning."

Rubin Wealth Advisors was born after 25 years of working with major financial firms like First Union, Principal Financial Group, and Wachovia. Now, Bob supports business owners and families who need guidance to achieve their goals. When faced with financial obstacles, Bob and his team helps them make smarter, more informed decisions. The Rubin Wealth Advisors team likes to go beyond the "average" set of advisors. RWA advisors obtain a deep understanding of your personal and financial needs along your wants and goals for the future.

As a "connector," Bob's favorite story is of a client/friend who called because they wanted to make their daughter's trip to D.C. more memorable. He connected them with friends in the White House, so she — and her entire class — could have a tour.

Bob Rubin likes to keep connected with the minds of tomorrow, as well. As a former 12 year member of the Board of Trustees at Florida Atlantic University and a former member of the FAU Foundation Board, he provides direction and support. Bob is also a member of the national board for Turning Point USA, helping to identify, empower, organize and mobilize conservative students. Bob also mentors veteran business owners through FAU College of Business Adams Center for Entrepreneurship.

When Bob is not in the office, you can usually find him hanging out with my family. They love going to Panthers hockey games, track days at Palm Beach International Raceway, sports car events like the 12 hours of Sebring and 24 hours of Le Mans and spending time with friends at the shooting range. As the family of a child with autism, we hold the cause very close to our hearts. The Rubins take part in many fundraisers for organizations. Together, they have raised significant funds for Autism After 21, and Bob continues to work with Transitioning Owls at FAU. The group, run by his his wife, Michelle, helps students with disabilities adapt to college life while receiving vocational training.