Agenda Item #: <u>36-</u>2

PALM BEACH COUNTY **BOARD OF COUNTY COMMISSIONERS**

BOARD APPOINTMENT SUMMARY

Meeting Date:

October 7, 2025

Department:

Office of Financial Management & Budget

Advisory Board:

Investment Policy Committee

I. EXECUTIVE BRIEF

Staff recommends motion to approve: reappointment of two (2) nominees to the County Investment Policy Committee (IPC), for the term beginning October 1, 2025 through September 28, 2028:

Reappointment

Seat Requirement

Nominated By

Johnny Ortiz

At-Large

Mayor Marino Vice Mayor Baxter Commissioner Weiss Commissioner Woodward

Commissioner Sachs

<u>Reappointment</u> Britt Deviney

Seat Requirement

At-Large

Nominated By

Mayor Marino Vice Mayor Baxter Commissioner Weiss Commissioner Woodward Commissioner Sachs

Summary: Under County Ordinance No. 87-11, as amended, the Palm Beach County Investment Ordinance, the Board of County Commissioners (BCC) created the IPC. The IPC was established for the purpose of developing, in cooperation with the Clerk, the County's Investment Policy. The Clerk and the IPC also evaluate the effectiveness of the Investment Policy as a guide for County investment practices. The IPC meets three (3) times a year and is comprised of seven (7) voting members. The IPC is comprised as follows: one (1) current member of the BCC who shall serve as chairperson, the County Sheriff or their designee, one (1) member of the Office of Financial & Budget selected by the County Administrator, four (4) at-large members having any combination of the following backgrounds and experience: experience in the investment banking community or securities community with five (5) years direct investment experience and present investment management responsibility; member of the public with substantial investment or securities experience; or a local banker with five (5) years direct investment experience and present investment management responsibility. Johnny Ortiz and Britt Deviney have served since October 2022, have attended all meetings in that time period, and are seeking re-appointment. These at-large appointees will serve a term of three (3) years, at which time the appointee may be re-appointed, or a new appointee selected by the BCC. A memorandum dated August 29, 2025 was sent to the BCC. 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 Chairperson. 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:

Boards/Committees Applications with Resumes

Recommended by: Sharp Mm

Department Director

9/12/25 Date

Legal Sufficiency:

Assistant County Attorney



PALM BEACH COUNTY
BOARD OF COUNTY COMMISSIONERS
BOARDS/COMMITTEES APPLICATION
301 N Olive Avenue, WPB, FL 33401
www.discover.pbcgov.org

BOARDS/COMMITTEES APPLICATION

The information provided on this form will be used in considering your nomination. (Answer "NONE" or "N/A" where appropriate.)

APPLICANT TO COMPLETE/SUBMIT THE FOLLOWING:

- SECTION II
- CONTRACTUAL RELATIONSHIPS
- CODE OF ETHICS TRAINING
- RESUME or BIOGRAPHY

SECTION I	(OFFICE USE	ONLY)		-	XAdvisor	y No	t Advisory	
BOARD/COM	MITTEE NAME:	Palm Beach (County Investmen	nt Policy C	Committee			
TYPE OF APP	OINTMENT:	X	AT-LARGE		DISTRICT#	***************************************		
		×	REAPPOINTM	ENT		NEW APPO	INTMENT	
TERM:		10/01/2025	START DATE		09/30/2028	END DATE		
LENGTH OF	ΓERM:	3	YEARS					
SEAT #:								
SEAT REQUIF	REMENT:	Palm Beach Co	ounty Resident					
COMPLETING	G AN UNEXPIRED TERM?		YE	'S	X	NO		
COIVII EEIIIV	IF YES: DUE TO:			SIGNATI		110	OTHER	
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	ered by the Board of County Co			N/				
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SECTION I	, .	leted by appl			A PALM BE	ACH COUNT	TY RESIDEN	Γ
•	t/Middle Initial/Last)		Johnny Ortiz J	r.				
ADDRESS:	16790 East Burns Drive	····			•			
CITY:	Loxahatchee		STATE:	FL	ZIP:	33470		
PHONE #:	561-719-2020							
EMAIL:	OrtizJ428@gmail.com							
BUSINESS/EI	MPLOYER NAME:		Pal	m Beach	County She	eriffs Office		
OCCUPATIO	N: <u> </u>	aw Enforcme	ent Sergeant					
ADDRESS:	3228 Gun Club Road				_			
CITY:	West Palm Beach		STATE:	FL	ZIP:	33406	_	
MAILING PR	FFFRENCF:	Х	RESIDENCE			BUSINESS		
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	VER BEEN CONNECTED OF				,	455	V	NO
	VER BEEN CONVICTED OF elony is not an automatic disqualifier		nti			YES	X	-NO
(confiction of 0)	IF YES - STATE THE COUR			SPOSITIO	N OF CASE	AND DATE:		
			N/A					

SECTION II - continue	d (to be completed by	applicant)				
CONTRACTUAL RELATION	NSHIPS: X	NONE	NOT	APPLICABLE/(Gov	ernmental En	tity)
Pursuant to Article XIII, Sec. 2-44 transaction for goods or services value sole source purchases, and transaction and the contract or transaction and the contract or transaction and you, as a board mor indirectly, or your employer of that none exist. Staff will review to	with Palm Beach County. Exceptications that do not exceed \$500 poor's board provides no regulation ansaction is disclosed at a public rember applicant, identify all controllers. This information shout the same applicant in the same applicant	ons to this prohibiti er year in aggregate n, oversight, manal meeting of the Boar tractual relationshi ald be provided in th	on include awards made These exemptions are gement, or policy-settin d of County Commission ps between Palm Beach ne space below. If there	e under sealed competi e described in the Code ig recommendations re iers. To determine con a County government a are no contracts or tra	itive bids, certa . This prohibition of the sum of the	in emergency and on does not apply object contract or his provision, it is ndividual, directly port, please verify
Contract/Transaction No.	Department/Division	Description	n of Service	<u>Term</u>		
Example: (R#XX-XX/PO XX) N/A	Parks & Rec	General Mai	ntenance	10/01/00 - 0	09/30/2100	
N/A						
SERVING ON OTHER ADV	ISORY BOARDS / COMM	NTTEES:				
Are you currently serving on a County?	·		in Palm Beach	YES	Х	NO
If YES, please list:	N/A					www.
All board members are required going, and pursuant to PPM CW-Code of Ethics, (Chapter 112, part	P-79 is required before appointm	nent, and upon reas se Florida Sunshine L ach County Cod	opointment. All board r .aw. e of Ethics can be fo	nembers must also be	familiar with th	
Any questions and/or concer www.palmbeachcountyethics	-		•			Ethics website
APPLICANT'S SIGNATURE: By Code of Ethics, and I have reco and Palm Beach County Code	eived the required Code of Eth	nics Training. By	signing below, I ackno	wledge that I will be		•
(NOTE: Signature must be an i	actual signature or an electron	nic signature. A " PRINTED	typed" signature (nan	ne) will not be accept	ted)	
SIGNATURE:	ans !	NAME:	Johnny Ortiz Jr.		DATE:	08/27/25
SECTION III - COMMI	SSIONER (OFFICE USE O	ONLY)	DIST	RICT#	_	
COMMISSIONER'S SIGNA	ATURE:				DATE:	<u> </u>
SECTION IV - (OFFICE	USE ONLY)			1		
APPOINTMENT MADE: BCC MEETING:	YES DATE		_NO			

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 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 (Latin America) 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
- Personnel Lifecycles
- Value-Based Due Diligence
- Employee Development & Management
- Negotiations & Conflict Resolution
- Team Development & LeadershipOperations & Resource Management
- Client Relations & Retention
- Regulatory Compliance
- Strategic & Tactical Planning
- Risk Analysis & Mitigation

CAREER SYNOPSIS

PBSO Commander, City of South Bay, FL | Palm Beach County Sheriff's Office (PBSO)

PBSO Security Liaison, Florida Crystal Corp. (Contract) | Palm Beach County Sheriff's Office

Detective Sergeant, Enforceable Writs Unit | Palm Beach County Sheriff's Office

PBSO Security Liaison, Chief Judge of the Fifteenth Judicial Circuit | Palm Beach County Sheriff's Office

Financial Crimes Detective | Palm Beach County Sheriff's Office

International Money Laundering & Organized Crime Agent | Palm Beach County Sheriff's Office

Hostage Negotiator | *Palm Beach County Sheriff's Office*

Police Officer | City of Delray Beach Police Department

1989-1995

1995 - Present

Faculty: Northwood University | Nova Southeastern University

Faculty, Adjunct Professor, Management, Marketing & Strategic Planning | Northwood University

Faculty, Adjunct Professor, International Marketing | Nova Southeastern University

2001 – 2015

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

Real Estate Broker's License	2022
CCMI: Financial Analysis for Commercial Investment Real	2020
Commercial Real Estate Investment Gold Coast Schools	2020
Financial and Investment Analysis for Commercial Real Estate Gold Coast Schools	2020
Insider's Guide to Building Wealth with Commercial Real Estate Gold Coast Schools	2019
Real Estate Sales Associate License Department of Business & Professional Regulation – Florida	2019

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.

FORMAL EDUCATION

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

Additional Education:

Florida Atlantic University
Drug Enforcement Administration
Delray Beach Police Department
South Florida Investigative
Support Center
U.S. Customs

Federal Law Enforcement Training

Fostering Police/Community Partnerships DEA "SkyNarc" Domestic Interdiction School Policing the Culturally Diverse Community

Colombian/Narcotics Money Laundering U.S. Customs Officer/ Blue Lightning Cross Designation Course Financial Forensic Techniques Financial Crimes Regional Strike Force Training Palm Beach County Sheriff's Office ANACAPA Sciences Inc. Broward Community Collage

Introduction to Suspicious Activity Reports (SAR)
Hostage Negotiation
Financial Manipulation Analysis
Instructor Techniques
Criminal Law
Advanced Narcotics Investigations
Undercover Investigations
Case and Court Preparation
Advanced Investigations, Interviews and Interrogations

SECTION II - continue	d (to be completed by a	pplicant)				
CONTRACTUAL RELATION	NSHIPS: X	NONE	NOT APPL	.ICABLE/(Go	vernmental E	ntity)
transaction for goods or services a sole source purchases, and transa when the advisory board member transaction and the contract or tra- necessary that you, as a board m or indirectly, or your employer o	i3 of the Palm Beach County Cod with Palm Beach County. Exception that do not exceed \$500 perer's board provides no regulation, ensaction is disclosed at a public member applicant, identify all control business. This information should his information and determine if you	is to this prohibition include year in aggregate. These ex oversight, management, or seting of the Board of County actual relationships between i be provided in the space be	awards made unde temptions are descr policy-setting reco y Commissioners. T n Palm Beach Coun- elow. If there are no	r sealed compet lbed in the Code immendations ro o determine con ty government a o contracts or tra	litive bids, certa 2. This prohibit egarding the s mpliance with and you as an l ansactions to re	ain emergency and don does not apply subject contract or this provision, it is individual, directly eport, please verify
Contract/Transaction No.	Department/Division	Description of Service	ce	<u>Term</u>		
Example: (R#XX-XX/PO XX) N/A	Parks & Rec	General Maintenance		10/01/00 -	09/30/2100	
N/A		N/A				
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	Training on the Palm Beac		s can be found o	on the web at	:	
	http://www.palmbeach					
Any questions and/or concern www.palmbeachcountyethics APPLICANT'S SIGNATURE: By: Code of Ethics, and I have rece	.com or contact us via email at signing below I acknowledge th	ethics@palmbeachcount at I have read, understar	lyethics.com or (5 nd and agree to a	61) 233-0724. blde by Article	XIII, The Pak	m Beach County
and Palm Beach County Code of	-					
(NOTE: Signoture must be an a	ctual signature or an electronic		nature (name) will	not be accept	ed)	
SIGNATURE:	any -	PRINTED NAME: Johnny	Ortiz Jr.		_DATE:	08/27/25
SECTION III - COMMIS	SIONER (OFFICE USE ON	ILY)	DISTRICT	I Simon	-	
COMMISSIONER'S SIGNA	TURE:	1/11	1	·-·	_DATE:	9/3/25
SECTION IV - (OFFICE	USE ONLY)					
APPOINTMENT MADE: BCC MEETING:	YES DATE	No				

CONTRACTUAL RELATION	ISHIPS: X	NONE	NOT APPLICABI	.E/(Governmental E	intity)
Pursuant to Article XIII, Sec. 2-44 transaction for goods or services was sole source purchases, and transamente the advisory board member transaction and the contract or transaction and transactions are about an accessory that you, as a board or transaction are contracted.	Is of the Palm Beach County Code with Palm Beach County. Exceptions that do not exceed \$500 per yer's board provides no regulation, is assection is disclosed at a public member applicant, Identify all contrar business. This information should his information and determine if you	s to this prohibition include awar year in aggregate. These exempl oversight, management, or poli- eting of the Board of County Con ctual relationships between Pali be provided in the space below	ds made under seased frons are described in cy-setting recomment fromssioners. To deter in Beach County gove If there are no contra	the Code. This prohibilitions regarding the mine compliance with riment and you as an cts or transactions to	ation does not apply subject contract or this provision, it is individual, directly report, please verify
Contract/Transaction No.	Department/Division	Description of Service	<u>Ter</u>	<u>m</u>	
Example: (R#XX-XX/PO XX) N/A	Parks & Rec	General Maintenance	10/	01/00 - 09/30/2100	
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		N/A			
SERVING ON OTHER ADA Are you currently serving on County?	/ISORY BOARDS / COMMI any other Advisory Boards or C	ITEES: ommittees within Palm Beac	h YE	s <u>x</u>	NO
If YES, please list:	N/A				
going, and pursuant to PPM CW Code of Ethics, (Chapter 112, par Any questions and/or conce www.palmbeachcountyethi APPLICANT'S SIGNATURE: B Code of Ethics, and I have re and Palm Beach County Code	http://www.palmbeach erns regarding Article XIII of the cs.com or contact us via email a y signing below I acknowledge to ceived the required Code of Ethi e of Ethics and the Florida Sunsh	tht, and upon reappointment. A florida Sunshine Law ch County Code of Ethics on countyethics.com/trair e Palm Beach County Code of the ethics@palmbeachcountyethat I have read, understand cs Training. By signing below line Law (Chapter 286, Florida)	can be found on the sing.htm. of Ethics, please view of thics.com or (561) and agree to abide v. I acknowledge that Statutes).	e web at: sit the Commission 233-0724. by Article XIII, The it I will be subject to	on Ethics website
(NOTE: Signature must be or SIGNATURE:	actual signoture or an electron	ic signature. A "typed" signa PRINTED NAME: Johnny C		be accepted) DATE:	08/27/25
SECTION III - COMM	ISSIONER (OFFICE USE C	(NLY)	DISTRICT#	0	
COMMISSIONER'S SIG		in for	yter	DATE	9/10/25
SECTION IV - (OFFIC	E USE ONLY)				
APPOINTMENT MADE:	150	NO			

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

SECTION II - continued (to be completed by applicant)

SECTION II - continue	d (to be comple	ted by a	pplicant)					
CONTRACTUAL RELATIO	NSHIPS:	Х	NONE		NOT APPI	.ICABLE/(Gov	vernmental E	ntity)
Pursuant to Article XIII, Sec. 2-4 transaction for goods or services sole source purchases, and transa when the advisory board membi transaction and the contract or transcessary that you, as a board mor indirectly, or your employer of that none exist. Staff will review to	with Palm Beach County ctions that do not excee er's board provides no ansaction is disclosed at ember applicant, identi r business. This informa	Exception d \$500 per regulation, a public me fy all contra tion should	is to this prohib year in aggrega oversight, man eating of the Boa actual relations' be provided in	ition include awar te, These exempl agement, or poli ard of County Con sips between Pali the space below.	ds made unde dons are descr cy-setting reco imissioners, T in Beach Coun if there are no	r sealed competi ibed in the Code immendations re o determine con ty government a contracts or tra	itive bids, cert This prohibit egarding the s npilance with and you as an assections to re	ain emergency and lon does not apply ubject contract or this provision, it is individual, directly eport, please verify
Contract/Transaction No.	Department/D	ivision	<u>Descriptl</u>	on of Service		<u>Term</u>		
Example: (R#XX-XX/PO XX) N/A	Parks & Rec		General Ma	iintenance		10/01/00 - 0	9/30/2100	
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SERVING ON OTHER ADV Are you currently serving on a	•			hin Balm Baach		•		
County?	any other Advisory Be	iarus or Co	minittees wit	mii raini beatii		YES	X	NO
If YES, please list:	N/A					·		
All board members are required to going, and pursuant to PPM CW-1 Code of Ethics, (Chapter 112, part Any questions and/or concern www.palmbeachcountyethics APPLICANT'S SIGNATURE: By Code of Ethics, and I have receand Palm Beach County Code of CNOTE: Signoture must be on a SIGNATURE:	P-79 is required before a lill of the Florida Statutes Training on the Pahttp://www.pal rs regarding Article a com or contact us visigning below I acknowled the required Cod of Ethics and the Florida.	oppointment), and the Falim Beach mbeache Illi of the a emall at wiedge the of Ethics is Sunshin	it, and upon reallorida Sunshine In County Concountyethic Palm Beach Continue ethics@palmia at I have read Training. By the Law (Chapte	ppointment. All Law. le of Ethics can s.com/training. County Code of peachcountyeth, understand an signing below, 1 r 286, Florida St	board member in be found of ig.htm. Ethics, pieas lcs.com or (5 d agree to al acknowledge atutes), e (name) will	is must also be for the web at: see visit the Cor 61) 233-0724. bide by Article that I will be s	familiar with the mmission on XIII, The Pal Subject to the	ne State of Florida Ethics website The Beach County
SECTION III - COMMIS	ISIONER (OFFICE	USE ON	LY)		DISTRICT		-	
COMMISSIONER'S SIGNA	TURE:	DU			>		DATE:	9/2/20
SECTION IV - (OFFICE	USE ONLY)		V					
APPOINTMENT MADE: BCC MEETING:	YE:		,	_NO				

SIGNATURE: /hmg/2	the second second	AME: Johnny Orliz	Jr.	DATE:
SECTION III - COMMISSION	JEK (OFFICE USE ONLY)	D	ISTRICT II U	
COMMISSIONER'S SIGNATURE	$\sim \sim $	i Wordund	1	— _ DATE:
SECTION IV - (OFFICE USE O	DNLY)			
APPOINTMENT MADE:	YES	NO		
BCC MEETING:	DATE			
Programme Provides Parks, Record Law	this document may be reviewed in	Aple recorded by monthers of t	the public	

SECTION II - continue	ed (to be compl	eteu by u	ppiicanti					
CONTRACTUAL RELATIO	NSHIPS:	X	NONE		NOT APPLI	CABLE/(G	overnmental E	ntity)
Pursuant to Article XIII, Sec. 2-4 transaction for goods or services sole source purchases, and transawhen the advisory board member transaction and the contract or transaction and the contract or transaction that you, as a board mor indirectly, or your employer of that none exist. Staff will review	with Palm Beach Count actions that do not exce ser's board provides no ransaction is disclosed a nember applicant, iden or business. This inform	ty. Exception ed \$500 per o regulation, at a public me tify all contra nation should	ns to this prohible year in aggregat oversight, mana eeting of the Boa actual relationsh I be provided in t	tion include aw te. These exem agement, or po trd of County Co lips between Pa the space below	ards made under ptions are describility-setting recommissioners. To alm Beach County or If there are no o	sealed completed in the Coo nimendations determine of government contracts or t	etitive bids, cert de. This prohibi regarding the compliance with t and you as an ransactions to r	ain emergency and tion does not apply subject contract or this provision, it is individual, directly eport, please verify
Contract/Transaction No.	Department/	<u>Division</u>	Description	on of Service		<u>Term</u>		
Example: (R#XX-XX/PO XX)	Parks & Rec		General Ma	intenance		10/01/00	- 09/30/2100	
N/A	:							
N/A								
	:		N/A					
SERVING ON OTHER ADV	VISORY BOARDS /	COMMIT	TTEES:					
Are you currently serving on	any other Advisory E	Boards or Co	ommittees with	hin Palm Bead	:h	YES	٠.	NO
County?	N1/0					, 20	X	
If YES, please list:	N/A							
CODE OF ETHICS TRAINI	NG:	YES	COMPLETE	D	DATE:	08	/27/25	
All board members are required going, and pursuant to PPM CW- Code of Ethics, (Chapter 112, part	P-79 is required before	e appointmer	nt, and upon rea	ppointment. A				•
	Training on the	Palm Beac	h County Cod	le of Ethics o	an be found o	n the web a	ıt:	
	http://www.pa	<u>almbeach</u>	countyethic	s.com/train	ing.htm.			
	:							
Any questions and/or concer				•				n Ethics website
www.palmbeachcountyethic			•	<u>-</u>				
APPLICANT'S SIGNATURE: By Code of Ethics, and I have rec- and Palm Beach County Code	eived the required Co	ode of Ethic	s Training. By	signing below	, I acknowledge			•
(NOTE: Signature must be an	actual signature or a	n electronic	: signature. A "	ʻtyped" signat	ure (name) will	not be acce _l	oted)	
	<i>A</i> ,	The same of the sa	PRINTED					
SIGNATURE:	Jarak	/	NAME:	Johnny Q	rtiz Jr.		DATE:	08/27/25
17,00					· · · · · · · · · · · · · · · · · · ·			
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SECTION IV - (OFFICE	USE ONLY)							
APPOINTMENT MADE:		ES.		_NO				
BCC MEETING:		DATE						



PALM BEACH COUNTY
BOARD OF COUNTY COMMISSIONERS
BOARDS/COMMITTEES APPLICATION

301 N Olive Avenue, WPB, FL 33401 www.discover.pbcgov.org

BOARDS/COMMITTEES APPLICATION

The information provided on this form will be used in considering your nomination. (Answer "NONE" or "N/A" where appropriate.)

APPLICANT TO COMPLETE/SUBMIT THE FOLLOWING:

- SECTION II
- CONTRACTUAL RELATIONSHIPS
- CODE OF ETHICS TRAINING
- RESUME or BIOGRAPHY

SECTION	l (OF	FICE USE ONLY)		_	Advisor	γΝο	ot Advisory
BOARD/COM	MMITTEE NAME:	PBC Invest	ment Policy	Committee			
TYPE OF APP	POINTMENT:	X	AT-LARGE		DISTRICT #	*	
		- X	REAPPOINT	MENT	***	NEW APPO	DINTMENT
TERM:		10-1-2025	START DAT	E	9-30-2028	END DATE	
LENGTH OF	TERM:	3	YEARS				
SEAT #:		·					
SEAT REQUI	REMENT:	Palm Beach C	ounty Resident				
CONADIETIN	C AN UNITYDIDED	:		V.E.C	V	NO	
COMPLETIN	G AN UNEXPIRED T	*		YES	X	NO	OTHER
		ETO:		RESIGNATI	UN		OTHER
	COMPLETING TE ORIGINAL TERM	•					-
	ONIGINAL TERIV	EAFINES.					
*When a perso	m is being considered	for reappointment, the ni	umber of previo	ous disclosed	voting conflict	s during the v	revious term
		County Commissioners:				3 1	
CECTION	11 /			****			
SECTION	•	be completed by app	•			ACH COUN	TY RESIDENT
•	t/Middle Initial/La	· •	Robert "Brit	tt" Deviney		···	
ADDRESS:	2545 Kittbuck W	ay	~~~	Pro-1		00444	
CITY: PHONE #:	WPB		STATE:	FL	ZIP:	33411	-
EMAIL:	561-329-2632 brittdeviney@gm	noil com					
CIVIAIL.	brittdevirley@giri	ian.com					
BUSINESS/E	MPLOYER NAME:	:			Self		
OCCUPATIO	N:	Independent Fir	nancial Advis	or	•		
ADDRESS:	301 W. Atlantic A	Ave. #8	,		-		
CITY:	Delray Beach		STATE:	<u>FL</u>	ZIP:	33444	_
MAILING PR	EFEDENICE,	•	PECIPENICE			OHEIMEEE	
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R. Britt Deviney

Independent Financial Planner 410 Evernia St #201 WPB FI, 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 Calvary 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

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	SECTION II - continu	ied (to be compl	eted by ap	plicant)						
	CONTRACTUAL RELATIONSHIPS:		X	NONE	NOT	OT APPLICABLE/(Governmental Entity)				
	Pursuant to Article XIII, Sec. 2- transaction for goods or service sele source purchases, and trans when the advisory board mem transaction and the contract or t necessary that you, as a board to or indirectly, or your employer that none exist. Staff will review	403 of the Palm Beach s with Palm Beach County actions that do not exceed ber's board provides no ransaction is disclosed at member epplicant, Idontion business. This information is uninessed.	r. Exceptions to ed \$500 per ye regulation, by a public meeti fy all contraction should be	o this promother or in aggregate. ersight, managet ng of the Boord o ini relationships movided in the s	Thuse exemptions are nent, or palley-settin of County Commission Botwaan Falm Beach once below. If there a	described in the Co g recommendations ers. To debarming c County government tre no contracts or to	ide. This proi Tegarding th ompliance wi Land you as a ransactions to	nibition does no ne subject cont fth this provisio no individual, d report, please		
	Contract/Transaction No.	Department/DI	<u>vişlon</u>	<u>Description of</u>	Sorvice	<u>Term</u>				
	Example: (R#XX-XX/PO XX)	Parks & Rec	G	eneral Mainton	iance	10/01/00 - 0	9/30/2100			

	SERVING ON OTHER ADV Are you currently serving on a County? If YES, please list:	/ISORY BOARDS / C	OMMITTEE rds or Comm	S: ittees within Pai	im Beach	YES -	X	NŌ		
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	Any questions and/or concerns summerpalmbeachcountyethles.c	regarding Article XIII o om or contact us via en	of the Palm B Pall at ethics@	each County Co palmbeachcoun	de of Ethics, please tyethics.com or (561	visit the Commissi) 233-0724.	on an Èthlo	website		
	APPLICANT'S SIGNATURE: By sign Code of Ethics, and I have received and Palm Beach County Code of	ed the required Code of Ethles and the Florida Su	Ethics Training nshine Law (C	, By signing bei hapter 286, Flori	ow, I acknowledge the do Statutes).	at I will be subject t	e Palm Bead o the State o	r County Fillorida		
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	SIGNATURE:	Delun	NAM!	· •	H Dev	iney Date:	Ava	29,JOST		
	SECTION III - COMMISSIO	ONER (OFFICE USE	· · ·	1	DISTRICT #	4	***************************************			
	COMMISSIONER'S SIGNATU SECTION IV - (OFFICE USE		<u>na VVI</u>	beluen of		DATE:				
	APPOINTMENT MADE:	,		440						
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SERVING ON OTHER ADV		-, ,			·				i de	4
Are you currently serving on a County?	ny other /	Advisory Boards or C	ommittees within	ı Palm Beach		YES	X	NO		
If YES, please list:					Control de la		· · · · · · · · · · · · · · · · · · ·	****		
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