

PALM BEACH COUNTY
BOARD OF COUNTY COMMISSIONERS

BOARD APPOINTMENT SUMMARY

Meeting Date:	February 3, 2026
Department:	Office of Financial Management & Budget
Advisory Board:	Investment Policy Committee

I. EXECUTIVE BRIEF

Motion & Title: Staff recommends motion to approve: the appointment of two (2) nominees to the County Investment Policy Committee (IPC), for the term beginning February 3, 2026 through September 28, 2028:

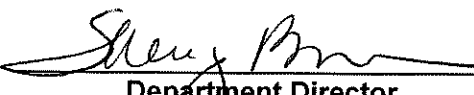

<u>Appointment</u>	<u>Seat Requirement</u>	<u>Nominated By</u>
Norman Taplin	At-Large	Commissioner Marino Commissioner Weiss Commissioner Sachs
Joshua Glassman	At-Large	Commissioner Marino Commissioner Sachs Commissioner Powell

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. Steve Freilich and Ned Nashban have termed out and their vacated seats need to be filled. Norman Taplin is seeking appointment. The current nominee, Mr. Taplin has disclosed that he serves on the National Cabinet of Israeli Bonds, and is a past Chairman of the Palm Beach County State of Israeli Bonds. The County is a current investor in Israeli bonds; staff seeks a waiver of the conflict of interest provisions contained in Section 2-443(d) and (e) **by an affirmative vote of a majority plus one** of the total BCC membership (5 votes). Both nominees will serve a term of three (3) years, at which time the nominee may be re-appointed, or a new appointee selected by the BCC. Memorandums dated October 27, 2025 for Mr. Taplin and December 17, 2025 for Mr. Glassman were 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 (3) 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:

- 1. Boards/Committees Applications with Resumes
- 2. Current Member List

Recommended by:		1/27/2026
	Department Director	Date
Legal Sufficiency:		1/27/2026
	Assistant County Attorney	Date

II. REVIEW COMMENTS

A. Other Department Review:

Department Director



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) ☒ Advisory ☐ Not Advisory
BOARD/COMMITTEE NAME: Investment Policy Committee
TYPE OF APPOINTMENT: ☒ AT-LARGE ☐ DISTRICT #
☐ REAPPOINTMENT ☒ NEW APPOINTMENT
TERM: 02/03/26 START DATE 09/30/28 END DATE
LENGTH OF TERM: 3 YEARS
SEAT #:
SEAT REQUIREMENT:

COMPLETING AN UNEXPIRED TERM? ☐ YES ☒ NO
IF YES: DUE TO: ☐ RESIGNATION ☐ OTHER
COMPLETING TERM FOR:
ORIGINAL TERM EXPIRES:

**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 (to be completed by applicant) ***MUST BE A PALM BEACH COUNTY RESIDENT**

NAME: (First/Middle Initial/Last) Norman E. Taplin
ADDRESS: 2988 Gin Berry Way
CITY: West Palm Beach STATE: FL ZIP: 33401
PHONE #: 561-662-9405
EMAIL: netaplin@gmail.com

BUSINESS/EMPLOYER NAME: NTG Consultants, Inc.
OCCUPATION: Chairman/Chief Executive Officer
ADDRESS: 1555 Palm Beach Lakes Boulevard, Suite 1510
CITY: West Palm Beach STATE: FL ZIP: 33401
MAILING PREFERENCE: ☐ RESIDENCE ☒ BUSINESS

HAVE YOU EVER BEEN CONVICTED OF A FELONY: ☐ YES ☒ NO
(conviction of a felony is not an automatic disqualifier from appointment)

IF YES - STATE THE COURT, NATURE OF OFFENSE, DISPOSITION OF CASE AND DATE:

N/A

SECTION II - continued (to be completed by applicant)

CONTRACTUAL RELATIONSHIPS: _____ NONE _____ X _____ NOT APPLICABLE/(Governmental Entity)

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Contract/Transaction No.	Department/Division	Description of Service	Term
Example: {R#XX-XX/PO XX}	Parks & Rec	General Maintenance	10/01/00 - 09/30/2100

SERVING ON OTHER ADVISORY BOARDS / COMMITTEES:

Are you currently serving on any other Advisory Boards or Committees within Palm Beach County? _____ YES _____ X _____ NO

If YES, please list: _____

CODE OF ETHICS TRAINING: _____ X _____ COMPLETED DATE: _____ October 24, 2025

All board members are required to read and complete training on Article XIII of the Palm Beach Code, the Palm Beach County Code of Ethics. Ethics training is ongoing, and pursuant to PPM CW-P-79 is required before appointment, and upon reappointment. All board members must also be familiar with the State of Florida Code of Ethics, (Chapter 112, part III of the Florida Statutes), and the Florida Sunshine Law.


Training on the Palm Beach County Code of Ethics can be found on the web at:

<http://www.palmbeachcountyethics.com/training.htm>.

Any questions and/or concerns regarding Article XIII of 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.

APPLICANT'S SIGNATURE: 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 Code of Ethics Training. By signing below, I acknowledge that I will be subject to the State of Florida and Palm Beach County Code of Ethics and the Florida Sunshine Law (Chapter 286, Florida Statutes).

(NOTE: Signature must be an actual signature or an electronic signature. A "typed" signature (name) will not be accepted)

SIGNATURE:  PRINTED NAME: _____ Norman E. Taplin _____ DATE: _____ 10/24/25 _____

SECTION III - COMMISSIONER (OFFICE USE ONLY) DISTRICT # _____ 1 _____

COMMISSIONER'S SIGNATURE:  DATE: _____ 10/31/25 _____

SECTION IV - (OFFICE USE ONLY)

APPOINTMENT MADE: _____ YES _____ NO

BCC MEETING: _____ DATE _____

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)

CONTRACTUAL RELATIONSHIPS: _____ NONE _____ X _____ NOT APPLICABLE/(Governmental Entity)

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Example: (RXXX-XX/PO XX)	Parks & Rec	General Maintenance	10/01/00 - 09/30/2100
_____	_____	_____	_____
_____	_____	_____	_____

SERVING ON OTHER ADVISORY BOARDS / COMMITTEES:

Are you currently serving on any other Advisory Boards or Committees within Palm Beach County? _____ YES _____ X _____ NO
If YES, please list: _____

CODE OF ETHICS TRAINING: _____ X _____ COMPLETED DATE: _____ October 24, 2025 _____

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(NOTE: Signature must be an actual signature or an electronic signature. A "typed" signature (name) will not be accepted)

SIGNATURE: _____ PRINTED NAME: _____ Norman E. Taplin _____ DATE: _____ 10/24/25 _____

SECTION III - COMMISSIONER (OFFICE USE ONLY) DISTRICT # _____ 2 _____

COMMISSIONER'S SIGNATURE: _____ DATE: _____ 10/27/25 _____

SECTION IV - (OFFICE USE ONLY)

APPOINTMENT MADE: _____ YES _____ NO
BCC MEETING: _____ DATE _____

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SECTION II - continued (to be completed by applicant)

CONTRACTUAL RELATIONSHIPS: _____ NONE _____ X _____ NOT APPLICABLE/(Governmental Entity)

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If YES, please list: _____

CODE OF ETHICS TRAINING: _____ X _____ COMPLETED DATE: _____ October 24, 2025


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SIGNATURE:  PRINTED NAME: Norman E. Taplin DATE: 10/24/25

SECTION III - COMMISSIONER (OFFICE USE ONLY) DISTRICT # 5

COMMISSIONER'S SIGNATURE:  DATE: 11/5/20

SECTION IV - (OFFICE USE ONLY)

APPOINTMENT MADE: _____ YES _____ NO

BCC MEETING: _____ DATE _____

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Norman E. Taplin – ESQ

Norman Taplin is an attorney who concentrates his practice in the area of insurance regulatory consulting, administrative law, corporate and commercial law. Mr. Taplin is the President of Taplin & Associates, CEO of The Goldwater Taplin Group and Chief Executive Officer of NTG Consultants in West Palm Beach, FL, which have a presence and represents clients in all 50 states and the District of Columbia, as well as clients in the UK and Europe.

Norm is a graduate of Duke University School of Law, where he earned his JD. Mr. Taplin is a member of the Florida Bar, American Bar Association and Palm Beach County Bar Association as well as being licensed to practice before the Supreme Court of the United States.

Norm serves on the National Cabinet of Israel Bonds, and is a past Chairman of the Palm Beach County State of Israel Bonds. Norm is also a past President of Temple Emanu-El, in Palm Beach and Vice President of Temple Beth El in West Palm Beach. Mr. Taplin was on the Board of Trustees of the Jewish Arts Foundation, Anti-Defamation League and past Chairman of the Children's Trust.



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

BOARDS/COMMITTEES APPLICATION

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(Answer "NONE" or "N/A" where appropriate.)

- APPLICANT TO COMPLETE/SUBMIT THE FOLLOWING:
- SECTION II
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 - RESUME or BIOGRAPHY

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BOARD/COMMITTEE NAME: Investment Policy Committee

TYPE OF APPOINTMENT: ☒ AT-LARGE ☐ DISTRICT #
☐ REAPPOINTMENT ☒ NEW APPOINTMENT

TERM: 02/03/2026 START DATE 09/30/2028 END DATE

LENGTH OF TERM: 3 YEARS

SEAT #:

SEAT REQUIREMENT: PBC Resident

COMPLETING AN UNEXPIRED TERM? ☐ YES ☒ NO

IF YES: DUE TO: ☐ RESIGNATION ☐ OTHER

COMPLETING TERM FOR:

ORIGINAL TERM EXPIRES:

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SECTION II (to be completed by applicant) ***MUST BE A PALM BEACH COUNTY RESIDENT**

NAME: (First/Middle Initial/Last) H. Joshua Glassman

ADDRESS: 17605 Scarsdale Way

CITY: Boca Raton STATE: FL ZIP: 33496

PHONE #: 9174503413

EMAIL: Jglassman530@yahoo.com

BUSINESS/EMPLOYER NAME: University of Miami

OCCUPATION: Finance Professor

ADDRESS: 1320 S Dixie Hwy

CITY: Coral Gables STATE: FL ZIP: 33146

MAILING PREFERENCE: ☒ RESIDENCE ☐ BUSINESS

HAVE YOU EVER BEEN CONVICTED OF A FELONY: ☐ YES ☒ NO

(conviction of a felony is not an automatic disqualifier from appointment)

IF YES - STATE THE COURT, NATURE OF OFFENSE, DISPOSITION OF CASE AND DATE:

SECTION II - continued (to be completed by applicant)

CONTRACTUAL RELATIONSHIPS: X NONE NOT APPLICABLE/(Governmental Entity)

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

SERVING ON OTHER ADVISORY BOARDS / COMMITTEES:

Are you currently serving on any other Advisory Boards or Committees within Palm Beach County? YES X NO
If YES, please list:

CODE OF ETHICS TRAINING: X COMPLETED DATE: 12/15/25

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SIGNATURE: [Signature] PRINTED NAME: Joshua Glassman DATE: 12/15/25

SECTION III - COMMISSIONER (OFFICE USE ONLY) DISTRICT # 1

COMMISSIONER'S SIGNATURE: [Signature] DATE: 12/17/25

SECTION IV - (OFFICE USE ONLY)

APPOINTMENT MADE: YES NO
BCC MEETING: DATE

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SECTION II - continued (to be completed by applicant)

CONTRACTUAL RELATIONSHIPS: X NONE NOT APPLICABLE/(Governmental Entity)

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

SERVING ON OTHER ADVISORY BOARDS / COMMITTEES:

Are you currently serving on any other Advisory Boards or Committees within Palm Beach County? YES X NO

If YES, please list:

CODE OF ETHICS TRAINING: X COMPLETED DATE: 12/15/25

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(NOTE: Signature must be an actual signature or an electronic signature. A "typed" signature (name) will not be accepted)

SIGNATURE: [Signature] PRINTED NAME: Joshua Glassman DATE: 12/15/25

SECTION III - COMMISSIONER (OFFICE USE ONLY) DISTRICT # 5

COMMISSIONER'S SIGNATURE: [Signature] DATE: 12/18/25

SECTION IV - (OFFICE USE ONLY)

APPOINTMENT MADE: YES NO

BCC MEETING: DATE

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SECTION II - continued *(to be completed by applicant)*

CONTRACTUAL RELATIONSHIPS: X NONE NOT APPLICABLE/(Governmental Entity)

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

SERVING ON OTHER ADVISORY BOARDS / COMMITTEES:

Are you currently serving on any other Advisory Boards or Committees within Palm Beach County?

YES	X	NO
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If YES, please list:

CODE OF ETHICS TRAINING: X **COMPLETED** **DATE:** 12/15/25

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SIGNATURE: [Signature] PRINTED NAME: Joshua Glassman DATE: 12/15/25

SECTION III - COMMISSIONER (OFFICE USE ONLY)

DISTRICT # 7

COMMISSIONER'S SIGNATURE:

DATE: 12-18-25

SECTION IV - (OFFICE USE ONLY)

APPOINTMENT MADE: YES NO

BCC MEETING: _____ **DATE** _____

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JOSHUA GLASSMAN

17604 Scarsdale Way

Boca Raton, FL 33496

917-450-3413

jglassman530@yahoo.com

SUMMARY

Senior financial executive with nearly 25 years of experience in investment oversight, risk management, internal controls, and fiduciary governance. Former Goldman Sachs Partner with responsibility for large, regulated businesses and institutional capital. Extensive board and teaching experience spanning endowment oversight, public-service organizations, and higher education.

PROFESSIONAL EXPERIENCE

Goldman Sachs

Partner (2016–2025) | Managing Director (2011–2016)

Firm Tenure: 2002–2025

Co-Head, Americas Equities Distribution | 2019–2025

- Led the firm's equities distribution platform across the Americas, overseeing strategy, client coverage, and coordination with trading, risk, compliance, and operations; business generated over \$3 billion in annual revenue
- Managed major institutional investment and distribution businesses within rigorous regulatory, compliance, and risk frameworks.
- Accountable for governance, supervisory controls, and escalation processes in a highly regulated market environment.

Co-Head, North America Interest Rate Product Sales | 2017–2019

- Oversaw institutional distribution of interest rate products across North America, working closely with trading, risk management and compliance.

Head of Cross-Asset Sales | 2014–2017

- Led cross-asset investment solutions across equities, rates, credit, and derivatives, with a focus on capital efficiency and risk-aware decision-making.

University of Miami, Herbert Business School
Adjunct Professor | Current

- Teach undergraduate and graduate-level courses on capital markets, market structure, and alternative investments.
- Emphasize risk management, regulatory frameworks, and real-world institutional decision-making.

BOARD & FIDUCIARY EXPERIENCE

Saint Andrew's School — Boca Raton, FL
Board of Trustees | Chair, Investment Committee

- Provide fiduciary oversight of the school's endowment, including asset allocation, investment policy, manager selection, and performance evaluation.
- Partner with advisors and trustees to ensure prudent long-term stewardship and adherence to investment guidelines.

St. Barnabas Hospital — Bronx, NY
Board of Trustees

- Serve on the board of a public hospital delivering essential healthcare services in one of the poorest ZIP codes in New York State.
- Support financial oversight, audit-related governance, and risk management in a complex public-sector environment.

EDUCATION

Harvard University, Cambridge, MA
Bachelor of Arts, Class of 2002 – cum-laude in economics

Saint Andrew's School, Boca Raton, FL
Valedictorian, Class of 1998

Investment Policy Committee Member List

Commissioner Gregg Weiss	Chairperson
Sherry Mazorra	Sheriff's Office Designee
Sherry Brown	Director of the Office of Financial Management & Budget
Britt Deviney	At-Large
Johnny Ortiz	At-Large
Vacant	At-Large
Vacant	At-Large