



TOWN OF PALM BEACH

APPLICATION FOR SERVICE ON

INVESTMENT ADVISORY COMMITTEE

Please complete the application by typing or printing legibly in ink. Applications should be submitted to the Town Clerk (360 South County Road, Palm Beach, FL 33480, via facsimile 561-838-5417, or via e-mail addressed to townclerk@townofpalmbeach.com) no later than 5 p.m., 11 calendar days prior to the Town Council meeting in which the appointment will be considered. Completion of this application requires that applicant has reviewed certain Town documents as noted in this application. To review or obtain a copy of the documents please contact the Town Clerk's Office (561-838-5416). Please feel free to attach any additional background information to this application form.

Name: BOREY, GEORGE S Residence Address: 2275 S OCEAN BLVD

Mailing Address: PO Box 2884, PALM BEACH Home Telephone: (561) 588 0303

E-mail Address: gsborey@earthlink.net Work Telephone: (561) 542 8008 (CELL)

I am a resident of the Town of Palm Beach JS (please initial) KD

Please attach proof of Town of Palm Beach residency. Failure to attach proof of residency shall be grounds to reject your application. Proof of residency shall be either a copy of your Florida Driver's License matching the address of your residence as shown on this application, a copy of a utility bill in your name at the residence address shown on this application, or by providing an original, fully executed and notarized Declaration of Domicile with this application.

1. Why do you wish to be appointed as a member of the Investment Advisory Committee? (Please use additional pages if necessary)

BECAUSE OF BACKGROUND & EXPERIENCE AS
VP & TREASURER OF THE 2275 S OCEAN ASSOC. OF
PALM BEACH, & CHAIRMAN FINANCE COMM OF MAJOR NY CLUB

2. Please identify how many meetings of the Investment Advisory Committee you have attended in the past two (2) years.

☒ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4+

3. If you have served on any boards/commissions/committees in the Town of Palm Beach or elsewhere, please list them and include details such as length of service, attendance record, etc.

V.P. & TREASURER, CONDO ASSOC, PALM BEACH 2003-2009
CHAIRMAN, FINANCE COMM & TREASURER, MAJOR NY CLUB 1989-1993

4. Please indicate if there are any periods of time for which you will be unavailable for meetings.

NONE

5. Please describe your current or prior investment experience, and describe any fixed investment experience you may have.

AS TREASURER, BOTH OF THE REEF CONDO ASSOC IN PALM BEACH AND AS TREASURER & CHAIRMAN, FINANCE COMMITTEE, I BOUGHT & SOLD FIXED INCOME INVESTMENTS & WORKED WITH BANKS

6. Are you a member of any of the following organizations? (Check all that apply)

- ☐ Palm Beach Chamber of Commerce
☒ Palm Beach Civic Association
☒ Citizens' Association of Palm Beach

- ☐ Preservation Foundation of Palm Beach
☐ North End Property Owners Association
☐ Other _____

7. Present occupation. RETIRED

No. of years. N/A

Employer. _____

8. Past occupation(s). MEMBER, EXECUTIVE COMM

No. of years. 10

Employer(s). GRANT THORNTON INTERNATIONAL ACCOUNTANTS + HANGLT CONSULTANTS

9. Please provide details regarding your educational background:

ST PETER'S UNIVERSITY, B.A

GEORGETOWN LAW SCHOOL, LL.B

NYU GRADUATE LAW SCHOOL, LL.M

10. To enable Town Council to consider potential conflicts of interest, please provide the following information regarding family members who live and/or work in the Town of Palm Beach, including your spouse, parents, siblings or children.

Family Member Name	Relationship	Address	Occupation	Employer
<u>NONE</u>				

11. Have you ever been convicted of a crime or pled guilty or nolo contendere to a crime other than minor traffic violations? NO

12. If you are currently serving on a Town board, commission, or committee, please identify it in the space below and check the box that indicates you will resign from that position if you are appointed to the position you are seeking in this application.

☐ I will resign from the N/A if I am appointed to the position I am seeking in this application.
 board/commission/committee

The following information is needed to facilitate Town reporting requirements in Florida Statute 760.80. Please check one in each category.

RACE☐ African American☐ Native American☐ Asian American☒ Caucasian☐ Hispanic American☐ Not known**GENDER**☒ Male ☐ Female**PHYSICALLY DISABLED**☐ Yes ☒ No

I hereby certify that I have read the sections of the Town Code of Ordinances for the particular board/commission/committee that I have selected above and have noted the description of the board/commission/committee and its members' duties, and further I have read the regulations concerning absences and conflicts of interests. I certify the information given by me is true and complete to the best of my knowledge and belief. I understand that any falsification of material facts will be grounds for rejection of this application or dismissal after appointment.

SIGNATURE: _____

DATE: NOV 1, 2018

Please attach proof of Town of Palm Beach residency (as listed on page 1) with this application.

Please note that Board/Commission applications will expire on December 15 of each year.

INVESTMENT ADVISORY COMMITTEE

The Investment Advisory Committee consists of five members serving two year terms, appointed by the Town Council. Members of the Committee shall be residents of the Town and shall have prior fixed income investment experience. The Committee acts in an advisory capacity and shall make recommendations to the Town Council on matters relating to Town's investment policy and the investment of the Town's surplus funds. The Committee shall hold at least four meetings per year and more if it is deemed necessary. The Town of Palm Beach will not do business directly or indirectly with a Committee member or a Committee member's employer or business while they are serving on the Committee and for at least two years after the member's term has expired.

2018 OCT 25 4:10:53 PM CLERK



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Name: DAVID G. McDONALD Residence Address: 250 BRADLEY PL, #604

Mailing Address: SAME Home Telephone: 646-709-4215

E-mail Address: dgmcdonald1@gmail.com Work Telephone: SAME

I am a resident of the Town of Palm Beach KDM (please initial) KD

Please attach proof of Town of Palm Beach residency. Failure to attach proof of residency shall be grounds to reject your application. Proof of residency shall be either a copy of your Florida Driver's License matching the address of your residence as shown on this application, a copy of a utility bill in your name at the residence address shown on this application, or by providing an original, fully executed and notarized Declaration of Domicile with this application.

1. Why do you wish to be appointed as a member of the Investment Advisory Committee? (Please use additional pages if necessary)

see attached

2. Please identify how many meetings of the Investment Advisory Committee you have attended in the past two (2) years.

☒ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4+ (see attached)

3. If you have served on any boards/commissions/committees in the Town of Palm Beach or elsewhere, please list them and include details such as length of service, attendance record, etc.

see attached

4. Please indicate if there are any periods of time for which you will be unavailable for meetings.

Available for all meetings

5. Please describe your current or prior investment experience, and describe any fixed investment experience you may have.

See attached

6. Are you a member of any of the following organizations? (Check all that apply)

- ☐ Palm Beach Chamber of Commerce
☒ Palm Beach Civic Association
☐ Citizens' Association of Palm Beach

- ☒ Preservation Foundation of Palm Beach
☐ North End Property Owners Association
☐ Other _____

7. Present occupation. Investor No. of years. 9 mos

Employer. Self Employed

8. Past occupation(s). Investment Banking / Capital Markets No. of years. 26

Employer(s). Goldman Sachs (11), Morgan Stanley (12) Alex Brown (3)

9. Please provide details regarding your educational background:

Kellogg School of Management / Northwestern Univ. - MBA

Dyson School of Business / Cornell Univ. - BS

10. To enable Town Council to consider potential conflicts of interest, please provide the following information regarding family members who live and/or work in the Town of Palm Beach, including your spouse, parents, siblings or children.

Family Member Name	Relationship	Address	Occupation	Employer
Nicki McDonald	WIFE	250 Bradley Hwy	Volunteer	

11. Have you ever been convicted of a crime or pled guilty or nolo contendere to a crime other than minor traffic violations? NO

12. If you are currently serving on a Town board, commission, or committee, please identify it in the space below and check the box that indicates you will resign from that position if you are appointed to the position you are seeking in this application.

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☒ Caucasian

☐ Hispanic American

☐ Not known

GENDER

☒ Male ☐ Female

PHYSICALLY DISABLED

☐ Yes ☒ No

I hereby certify that I have read the sections of the Town Code of Ordinances for the particular board/commission/committee that I have selected above and have noted the description of the board/commission/committee and its members' duties, and further I have read the regulations concerning absences and conflicts of interests. I certify the information given by me is true and complete to the best of my knowledge and belief. I understand that any falsification of material facts will be grounds for rejection of this application or dismissal after appointment.

SIGNATURE: _____

William Bonard

DATE: _____

10/24/18

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DAVID G McDONALD 10/24/18

1) As of this year, I am a full time resident of Palm Beach and anxious to get more involved in the Town. After 26 years on Wall Street and personal investing, I think the range of my financial experience would be helpful to the Investment Advisory Committee.

2) Spoke with current Committee member Chris Storkerson about the Committee and the potential fit of my experience.

3) Dyson School of Business Advisory Board/Cornell University '07-'14
(President '11-'14)

Goldman Sachs Undergraduate Recruiting Team '10-'18

Vanderbilt University Parents Leadership Committee '08-'11

Point O'Woods (Fire Island NY) Volunteer Fire Co/Treasurer '06-'10

5) My prior investment experience was in Investment Banking, most recently as Head of Equity Syndicate at Goldman Sachs, and Institutional Sales. I worked closely with mutual funds and hedge funds, corporate managements, private equity and venture capital firms. Currently, I manage my personal assets across equities, fixed income, and alternative investments.