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By gayle at 10:35 am, Oct 26, 2020

**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](mailto: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: Michael B. Greenwald Residence Address: 130 Sunrise Ave #215 PB, FL  
Mailing Address: 130 Sunrise Ave #215 Home Telephone: 617 872-9898  
Palm Beach, FL 33480  
E-mail Address: michael.greenwald00@ Work Telephone: 617 872-9898  
gmail.com  
I am a resident of the Town of Palm Beach MBC (please initial) PGG

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+

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.

None

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 None

7. Present occupation. Director

No. of years. 3

Employer. Tiedemann Advisors

8. Past occupation(s). US Attache to Qatar & Kuwait

No. of years. 8

Employer(s). US Treasury Department

9. Please provide details regarding your educational background:

See attached

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

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 \_\_\_\_\_ if I am appointed to the position I am seeking in this application.  
board/commission/committee

n/a

**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: *Michael B. Green*

DATE: 10/19/20

**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.

### **Answer to Question#1**

I wish to be appointed as a member of The Investment Advisory Committee for The Town of Palm Beach. I truly believe and respect the need to protect the financial security and investments of The Town of Palm Beach. For over a decade in the highest levels of government and business, I have developed skills working in the investment community that recognized important and morally acceptable standards. At Tiedemann, I work closely with large high net worth families to advise on their future investments and planning. In this regard, our firm manages over \$20 billion in assets. During my career at the US Treasury, I have dedicated myself as a United States financial diplomat working in senior roles within the United States Treasury in Africa, Europe, and the Middle East as well working closely with law enforcement in national security capacities. From 2015 to 2017, I was the US Treasury attaché to Qatar and Kuwait, serving in two presidential administrations and under three treasury secretaries, and held counterterrorism and intelligence roles requiring travel to over 20 countries. In this capacity, I was the principal liaison from the US Treasury to the banking sector in Qatar and Kuwait. I am committed to the present and future well-being of the Town of Palm Beach.

### **Answer to Question #3**

#### **Board experience and memberships (past and current) include:**

- Member, Jewish Community Foundation, Jewish Federation of Palm Beach
- Visiting Fellow, Harvard Kennedy School's Belfer Center for Science and International Affairs
- Senior Nonresident Fellow, Atlantic Council Geoeconomics Center
- Deputy Executive Director, The Trilateral Commission
- Member, Aspen Institute Vanguard Society of Fellows
- Board Member, The Promise Fund of Palm Beach
- Member, Concordia
- Board Member, Halo Maritime Defense Systems
- Advisor, Dana Farber Cancer Institute (2017-2020)
- National Board Member and Chairman of the Finance Committee, Susan G. Komen Foundation (2018-2020)
- Adjunct Professor, Boston University Pardee School of Global Studies (2017-2019)
- Chairman Emeritus, United States Holocaust Memorial Museum Next Generation Board (2015-2017)

## **Answer to Question #5**

Michael Greenwald is uniquely positioned at the intersection of geopolitics and finance. Currently, he is Director at Tiedemann Advisors, a multi-family office managing over \$20 billion in assets, and Managing Director at Tiedemann-Constantia, a partner firm based in Zurich, Switzerland. Michael is responsible for managing a number of Tiedemann's client relationships and overseeing their advisors to provide solutions that address the challenges of stewardship of wealth over generations. As a member of the firm's business development and strategy team, he is a referral resource for attorneys and accountants.

Michael leads Tiedemann Constantia's business development strategy focused on the Middle East. He provides geopolitical and macroeconomic guidance to the firm and clients. Michael serves as a trusted advisor and manages senior relationships with family offices in the Middle East, Europe, and the United States.

Prior to joining Tiedemann in 2017, Michael worked in senior roles within the United States Treasury working with Africa and Europe. He served as a financial diplomat in the Middle East spanning the tenures of U.S. Treasury Secretaries Geithner, Lew, and Mnuchin. Greenwald initially served as the

United States Treasury Policy Advisor for Europe. In this role, he was appointed head of the United States Delegation to the Committee of Experts on the Evaluation of Anti-Money Laundering Measures and the Financing of Terrorism before the Council of Europe in Strasbourg, France. Greenwald was part of the U.S. Treasury team that crafted U.S. sanctions against Russia, the largest U.S. sanctions program to date, and negotiated similar sanctions by Europe. Between 2015-2017, he served as the first United States Treasury Attaché appointed to Qatar and Kuwait and opened the Treasury Department's office in Doha, Qatar. He also served in a variety of counterterrorism roles in the U.S. Intelligence Community and in the Office of General Council at the U.S. Treasury. Greenwald worked closely with the National Security Council at the White House tackling issues and crafting sanctions programs related to countering ISIS, Al-Qaeda, Hezbollah, Hamas, Iran, Ukraine/Russia, Syria, and North Korea.

Michael is a frequent speaker, writer and commentator on international security, the Middle East and the global economy. He has been featured on CNBC; published in Barrons; and given lectures at The Council on Foreign Relations, Harvard, Yale Law School, Stanford, and Northwestern Business School, Doha.

## **Answer to Question #9**

### **Education Background**

Michael earned a Juris Doctor degree from Boston University School of Law, a Master of Arts from Boston University's Frederick S. Pardee School of Global Studies, and a Bachelor of Arts in History from George Washington University.