

Application for Service

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By Kelly Churney at 9:44 am, Feb 25, 2022

Profile

John _____ W. _____ Copeland _____
First Name Middle Initial Last Name

1191 North Lake Way _____ Suite or Apt _____
Home Address

Palm Beach _____ FL _____ 33480 _____
City State Postal Code

john.copeland@wealthpcg.com _____
Email Address

Business: (561) 567-8161 _____ Mobile: (561) 319-6959 _____
Primary Phone Alternate Phone

Question applies to multiple boards

I am a resident of the Town of Palm Beach (Initial below)

JWC

Question applies to multiple boards

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's 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.

Question applies to multiple boards

 _____ Residency Confirmed
Please upload proof of residency

Which Boards would you like to apply for?

Retirement Board: Submitted

In what area of town do you live?

North

Interests/Experience

Question applies to Retirement Board

Why do you wish to be appointed as a member of the Retirement Board of Trustees?

I am committed to protecting and ensuring the long-term financial viability of the Town's retirement funds, and believe my experience in investments and wealth management would allow me to meaningfully contribute to the Palm Beach Retirement Board.

Question applies to Retirement Board

Please identify how many meetings of a Town Retirement Board you have attended in the past two (2) years? *

0

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

N/A

Question applies to multiple boards

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.

N/A

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

None Selected

Present Occupation

Managing Partner, Wealth Partners Capital Group

No. of years

5

Past occupation(s)

President, AMG Wealth Partners

John W. Copeland

No. of years

5

Please provide details regarding your educational background:

B.A. Georgetown University, 1984, magna cum laude J.D. Harvard Law School, 1988, magna cum laude M.S. MIT, 1988

[CV - 2022.docx](#)

Upload a Resume

Have you ever been convicted or pled guilty or nolo contendere to a crime other than minor traffic violations?

Yes No

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

I agree that I will resign from the board, commission, or committee if I am appointed to the position I am seeking in this application.

I Agree

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

Gianna F. Biondi (spouse) Aidan Biondi-Copeland (dependent child) Ariana Biondi-Copeland (dependent child)

Demographics

Some boards and commissions require membership to be racially, politically or geographically proportionate to the general public. The following information helps track our recruitment and diversity efforts.

Ethnicity

Caucasian/Non-Hispanic

Gender

Male

John W. Copeland

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 of dismissal after appointment.

I Agree

Question applies to Retirement Board

Please attach proof of residency (as listed above) with this application.

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

RETIREMENT BOARD OF TRUSTEES

The Retirement Board of Trustees consists of nine members as follows:

- One employee who is a member of benefit group general or benefit group lifeguard.
- One employee who is a member of benefit group firefighter.
- One employee who is a member of benefit group police officer.
- Five residents of the Town.
- The Town Manager.

The Retirement Board of Trustees acts in a fiduciary capacity for the Town's retirement funds and in an advisory capacity to the Town Council on matters relating to the administration of the Town's various retirement plans. Trustees other than the Town Manager or Acting Town Manager shall serve three-year terms, and may succeed themselves in office. The Retirement Board of Trustees will meet at least quarterly and on occasion, specially called meetings.

John W. Copeland
1191 North Lake Way
Palm Beach, FL 33480
(561) 319-6959 john.copeland@wealthpcg.com

Experience:

2017-Present: Wealth Partners Capital Group, LLC, Managing Partner **Palm Beach, FL**

- Launched firm in 2017 with five colleagues, partner firm AUM of \$ 11.3bn
- As of January 2022, firm has 21 employees and partner firm AUM of \$ 46 bn

2011-2017: AMG Wealth Partners, President **West Palm Beach, FL**

- Ran AMG division responsible for investing in registered investment advisory firms (RIAs)
- Grew division from \$ 0 to over \$ 40bn in AUM

2001-2008/ Lehman Brothers / Morgan Stanley **New York, NY**

2008-2011: Managing Director, Private Investment Management (PIM); Sr. Partner, Global Capital Mngmnt

- Oversaw one of largest PIM teams at the Firms; oversaw family assets of \$2.5bb

2000: Credit Suisse First Boston **New York, NY**

Managing Director, E-Commerce and Wealth Management

- Head of Wealth Management for Private Advisor, CSFB high net worth wealth division

1988-2000: Goldman, Sachs & Co. **Boston, MA / New York, NY**

1999 Managing Director, Private Client Services (PCS) Management

- One of four MDs responsible for Global Private Client Business of 450 salespeople, \$230bb in assets; focus on families and entities with over \$10mm in investable assets
- Designed, started and ran numerous new businesses, products and services (personal trust, open architecture, lending facilities, tax/estate planning, etc.)

1988-1999 Associate / Vice President / Managing Director, Private Client Services (PCS) Sales

- Started and lead the largest wealth management team for the Firm worldwide: team of fourteen responsible for 100+ clients; \$8bb+ in assets
- Lead new business generation, asset management, client relationships, strategic team growth
- 1993-1995: Recruited and trained all Equities Division and PCS New Associates and analysts
- Hired and managed over 300 associates and 100 analysts

Education:

1984-1988 Harvard Law School and MIT Sloan School of Management: Dual Degree Program

Harvard Law School **Cambridge, Massachusetts**

- J.D.; *Magna Cum Laude*
- Concentrations: Securities Law, Corporate Law, Taxation

MIT Sloan School of Management **Cambridge, Massachusetts**

- M.S.; completed two year program requirements in eighteen months
- Concentrations: Accounting, Taxation, Finance

1980-1984 Georgetown University, **Washington D.C.**

- B.A.; *Magna Cum Laude*, Dean's List; Phi Beta Kappa
- Dual major: English Literature and Economics; Varsity Swim Team

Personal: Married, three children

Chairman of the Board, Rainforest Foundation U.S.
Guest Lecturer, Tufts Univ. Volunteer speaker, NYC public schools
Life Member, Sierra Club; Jackson Hole Land Trust, Jackson WY