



RECEIVED

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Town Clerk's Office

## Town of Palm Beach Application for Service

Re appointment IAC

\* Denotes a required field

### Profile

First Name \*

Anderson

Middle Initial

M

Last Name \*

Kathleen

Home Address \*

2660 S Ocean Blvd

Apt 401W

City \*

Palm Beach

State \*

FL

Postal Code \*

33480

Email Address \*

kma2658@aol.com

Primary Phone \*

Home

(609) 915-9318

Alternate Phone

Home

Question applies to multiple boards

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

Kma

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

Please upload proof of residency

Choose file

accepted formats: doc, docx, rtf, txt, and pdf

Which Boards would you like to apply for? \*

 This board does not have a vacancy

Investment Advisory  
Committee ▼

These board-specific questions have been added to your application:

Investment Advisory Committee

I am a resident of the Town of Palm Beach (Initial below) **Go to Question**

**Go to Question**

Please upload proof of residency **Go to Question**

Why are you interested in serving on the Investment Advisory Committee? **Go to Question**

How many meetings of the Investment Advisory Committee have you attended in the past two (2) years? **Go to Question**

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. **Go to Question**

Please describe your current or prior investment experience, and describe any fixed investment experience you may have. **Go to Question**

**Go to Question**

In what area of town do  
you live?

South

## Interests/Experience

Question applies to Investment Advisory Committee

Why are you interested in serving on the Investment Advisory Committee? \*

I believe that I have added value to the process in terms of discussions and decision making

Question applies to Investment Advisory Committee

How many meetings of the Investment Advisory Committee have you attended in the past two (2) years? \*

4+

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

None

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

Question applies to Investment Advisory Committee

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

Worked on Wall Street for about 40 years either as an analyst or portfolio manager My investment style has always been on income generation and minimization of downside risk

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

Palm Beach Civic Association ▼

Present Occupation

Retired

No. of years

5

Past occupation(s)

Managing Director of BlackRock. Analyst and portfolio manager of Equity Income Fund and BlackRock Utility and Infrastructure Fund. Previous Merrill Lynch

No. of years

About 40 years

Please provide details regarding your educational background:

BBA in Economics and Finance

Upload a Resume \*

Choose file

Accepted file types: RTF, DOC, DOCX, PDF, TXT, JPG, JPEG, GIF, PNG

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. \*

None

## 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

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 of dismissal after appointment.

☒ I Agree \*

Question applies to Investment Advisory Committee

***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.

Withdraw

(/boards/forms/693/apply/2438942?code=86100faf-32bd-4330-b385-

b945f6422b9d)

Submit

View as PDF/Print (/boards/forms/693/apply/2438942.pdf?code=86100faf-32bd-4330-b385-b945f6422b9d&no\_redaction=true)

Save for later