

## Application for Service

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### Profile

Greenwald

First Name

B

Middle Initial

Michael

Last Name

130 Sunrise Ave

Home Address

Apt 215

Suite or Apt

Palm Beach

City

FL

State

33480

Postal Code

michael.greenwald00@gmail.com

Email Address

Home: (617) 872-9898

Primary Phone

Alternate Phone

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Question applies to multiple boards

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

Yes

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

[MBG\\_License.docx](#)

Please upload proof of residency

**Which Boards would you like to apply for?**

Investment Advisory Committee: Submitted

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**In what area of town do you live?**

☒ Midtown

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**Interests/Experience**

Question applies to Investment Advisory Committee

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

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My wife and I both grew up coming to Palm Beach, so living here now as a married couple brings our lives full circle. We both care deeply about doing our parts to help our community here thrive, and I believe I could make my strongest contribution to our town by serving on our Investment Committee. I have spent almost 5 years at Tiedemann Advisors, a multi-family office, and have helped oversee the firm's global expansion. When I started, Tiedemann managed \$12 billion in assets, and I helped grow our assets under management to over \$30 billion. I help advise many of our endowment and foundation clients on maintaining and growing their funds. I strategize with them on how to capitalize on future market trends while catering to their individualized risk profiles. As a member of the Investment Committee, I would seek to actively shape the investment strategy to make sure Palm Beach thrives for many years to come.

Question applies to Investment Advisory Committee

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

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☒ 4+

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

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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.**

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Town of Palm Beach Investment Advisory Committee (2020 - Present) The Promise Fund of Florida (2020 - Present; serving as Vice Chairman) Intercontinental Real Estate Corporation (2019 - Present) Halo Maritime Defense Systems (2018 - Present) Susan G. Komen Foundation (2017 - 2019)

Question applies to Investment Advisory Committee

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

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I currently work at Tiedemann Advisors, a multi-family office, where I help manage clients ranging from multi-generational families to large institutions with endowments and foundations. Each client has different goals and varying risk thresholds, so I help guide them on making smart investments that align with future market trends while taking into account their unique circumstances.

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

None Selected

**Present Occupation**

Director at Tiedemann Advisors and Head of Digital Asset Education at Tiedemann Advisors

**No. of years**

4.5

**Past occupation(s)**

United States Treasury Attachè to Qatar and Kuwait (August 2015 - July 2017) Policy Advisor for Europe, Office of Terrorism and Financial Crimes (February 2013 - August 2015) Intelligence Analyst, Office of Terrorism and Financial Intelligence (August 2010 - February 2013)

**No. of years**

7

**Please provide details regarding your educational background:**

Boston University School of Law (2007 - 2010) - Juris Doctor, concentration: National Security Law  
Boston University Graduate School of International Relations (2006 - 2007) - Master of Arts, International Relations, concentration: National Security Policy and Anti-Terrorist Financing - Honors: Summa Cum Laude (Class Rank #1) - Awards: Graduate Prize for Excellence in International Relations The George Washington University (2002 - 2006) - Bachelor of Arts, History, concentration: Homeland Security - Honors: Cum Laude - NCAA Division I Squash Team Award for Excellence in Academics

[Michael Greenwald Resume.pdf](#)

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.

N/A

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**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

**Physically Disabled**

☐ Yes ☒ No

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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.

# MICHAEL GREENWALD

Michael.greenwald00@gmail.com • (617) 872-9898

## ABOUT

Michael Greenwald is a thought-leader, former financial diplomat, professor, and author with over 10 years of experience in finance, corporate strategy, public policy, and diplomacy. Michael has spent most of his life in the public sector working for the U.S. Treasury culminating with serving as our country's first and most senior Treasury diplomat to Qatar and Kuwait. After departing Treasury, he has used experiences overseas and knowledge of international politics and monetary policy to lead the domestic and international growth of a global multi-family office with over \$30 billion in assets. He has spent his life focused on highly sensitive issues and working out solutions to consequential matters, so he is well-suited high level strategy roles focused on monetary policy and geopolitical direction at Fortune 500 companies.

## EDUCATION

### **Boston University School of Law (2007 – 2010)**

- Juris Doctor, concentration: National Security Law
- Founder and President, National Security Law Society

### **Boston University Graduate School of International Relations (2006 – 2007)**

- Master of Arts, International Relations, concentration: National Security Policy and Anti-Terrorist Financing
- Honors: Summa Cum Laude (Class Rank #1)
- Awards: Graduate Prize for Excellence in International Relations

### **The George Washington University (2002 – 2006)**

- Bachelor of Arts, History, concentration: Homeland Security
- Honors: Cum Laude
- NCAA Division I Squash Team Award for Excellence in Academics

## CERTIFICATIONS/CLEARANCES

Amazon Certified Cloud Practitioner (2021 - Present)  
Top Secret/SCI Clearance (2010 - 2020)

## PROFESSIONAL EXPERIENCE

### **Tiedemann Advisors and Tiedemann Constantia**

**July 2017 - Present**

*Director (Tiedemann Advisors), Managing Director (Tiedemann Constantia), Head of Digital Asset Education*

- Develops relationships with families and foundations that led to over \$500 million of new assets under management
- Formulates business development strategy focused on Europe, Asia, and the Middle East and acts as the main point-person on international relationships with global families and family offices
- Leads geopolitical and macroeconomic strategic discussions with thought leaders for the firm and clients regarding the environmental social governance (ESG) strategy dealing with financial inclusion and equity issues
- Manages senior relationships with families and family offices globally regarding the current regulatory landscape with Central Bank Digital Currencies, Stable Coins, and decentralized finance
- Provides education and strategy across the firm and investment group on issues related to blockchain technology
- Spearheads thoughtful collaboration with private industry, and high impact global nonprofits and foundations

### **United States Department of Treasury**

**August 2010 – July 2017**

*United States Treasury Attaché to Qatar and Kuwait (August 2015 – July 2017)*

- Established and opened the Treasury Department's office in Doha, Qatar in August 2015 serving as our country's most senior representative to Qatar and Kuwait

- Worked with security and regulatory authorities to understand, degrade, and disrupt the funding of terrorist groups, organized crime, and rogue states across the region
- Disrupted terrorist financing and support to the Iranian Islamic Revolutionary Guards' Quds Force and another Middle East-based terrorist group
- Managed the U.S.'s relationships with the Qatar and Kuwaiti sovereign wealth funds, finance ministries, central banks, and financial institutions
- Navigated fiscal issues and reform in a low oil price environment, increasing stability and transparency in banking systems, developing debt capital markets, and promoting sovereign wealth investment in the United States

*Policy Advisor for Europe, Office of Terrorism and Financial Crimes (February 2013 - August 2015)*

- Developed and implemented strategies involving sanctions and authorities to combat national security threats and safeguard the U.S. financial system from a range of illicit finance threats in Europe and Ukraine/Russia
- Represented the Treasury Department in White House meetings and with foreign governments and the private sector to inform them of Treasury policy objectives and to secure cooperation in achieving those objectives
- Assisted with Treasury and interagency efforts in Ukraine to aid leadership in developing a sanctions regime
- Advised senior Treasury Department officials on EU litigation issues dealing with Iran, Syria, Ukraine/Russia, and Hamas
- Served as Head of the U.S. delegation to the Committee of Experts on the Evaluation of Anti-Money Laundering Measures and the Financing of Terrorism (MONEYVAL) working closely with the Council of Europe and 35 European countries

*Intelligence Analyst, Office of Terrorism and Financial Intelligence (August 2010 - February 2013)*

- Served as a Treasury intelligence advisor on Africa based Al-Qaeda affiliated terrorist groups advising Treasury senior leadership, National Security Council and Intelligence Community
- Developed and implemented the U.S. Government's legal strategy to disrupt terrorist groups' financial support networks in Africa

## Fellowships and Non-Executive Engagements

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### **Center for New American Security (2021 – Present)**

- Senior Fellow

### **Town of Palm Beach Investment Committee (2020 – Present)**

- Elected Member

### **The Promise Fund of Florida (2020 – Present)**

- Vice Chairman of the Board
- Initiated a partnership between The Promise Fund and the Qatar Cancer Society

### **Trilateral Commission (2019 – Present)**

- North American Group Deputy Director working with David Rockefeller Fellows

### **Intercontinental Real Estate Corporation (2019 – Present)**

- Board Member

### **The Harvard Kennedy Belfer Center (2018 – Present)**

- Fellow & Lecturer and author

### **The Atlantic Council (2018 - Present)**

- Senior Advisor to CEO and President; Senior Fellow

### **Halo Maritime Defense Systems (2018 – Present)**

- Board Member

### **Dana-Farber Cancer Institute (2018 – 2020)**

- Senior Advisor

### **Susan G. Komen Foundation (2017 – 2019)**

- Board Member and Finance Committee Chairman

### **Aspen Institute (2015 – Present)**

- Vanguard Society of Fellows