

Application for Service

Profile

Jacqueline _____ E _____ de Sanctis _____
 First Name Middle Initial Last Name

2190 Ibis Isle Road _____ Unit 4 _____
 Home Address Suite or Apt

Palm Beach _____ FL _____ 33480 _____
 City State Postal Code

jdesanctis@me.com _____
 Email Address

Mobile: (917) 742-0742 _____
 Primary Phone Alternate Phone

Question applies to multiple boards

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

JD

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

VERIFIED 10220819 - KMC

 Please upload proof of residency

Which Boards would you like to apply for?

Investment Advisory Committee: Submitted

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 am taking a break for working full time for almost 25 years in the investment management business and I thought maybe my skill-set and experience could be applicable to the position.

Question applies to Investment Advisory Committee

How many meetings of the Investment Advisory Committee have you 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.

At present, 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 in asset management firms/banks with large fixed income platforms.

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

None Selected

Present Occupation

Unemployed

No. of years

3 months

Jacqueline E de Sanctis

Past occupation(s)

Asset Management - Sales and Client Service

No. of years

24

Please provide details regarding your educational background:

Masters, Classical Studies, University of St Andrews, Scotland.

Jacqueline_Elizabeth_de_Sanctis_-
_Resume_2022_updated.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.

James Bishop, Panther National

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.

Jacqueline Elizabeth de Sanctis

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917.742.0742 jdesanctis@me.com

EXPERIENCE

Cliffwater LLC

Managing Director, Head of Institutional Business Development

West Palm Beach, FL
December 2020 – June 2022

- Hired to help scale the advisory business (\$96BN AUA) and the asset management business (\$9BN AUM) in the institutional market globally
- Brought Cliffwater to 15 finals presentations for alternatives consulting since joining the firm
- Raised \$25M in assets for the Cliffwater Private Credit Interval Fund (CCLFX)

ClearSky

Managing Director, Head of Investor Relations

Juno Beach, FL
December 2019 – December 2020

- Hired to grow and cultivate new business opportunities from institutional investors
- Developed and implemented a marketing strategy to identify and develop new business opportunities for the fund
- Had \$100M in the pipeline at final due diligence for ClearSky Power and Tech Fund II until NextEra initiated a lawsuit against ClearSky founders in November of 2020

NEUBERGER BERMAN LLC

Managing Director, Client Relationship Manager

Los Angeles, CA
August 2016 – September 2019

- Hired to grow and cultivate new business opportunities from Corporates, Endowments & Foundations on the West Coast
- Developed and implemented a marketing strategy to identify and develop new business opportunities for the firm
- Successfully cultivated new business opportunities in the first two years from leading prospects resulting in \$6M in RRR and six new client relationships for NB

NEUBERGER BERMAN LLC

Managing Director, East Coast Consultant Relations

New York, NY
August 2014 – August 2016

- Actively managed relationships with research and field consultants regarding the full breadth of firm investment capabilities; Fixed Income, Equities and Alternative Investments
- Successful track record of securing “buy” ratings and revenue generation from leading consultants in the eastern region
- Responsible for direct management and oversight of 13 Institutional Business Development Analysts and Associates that are tasked with supporting the senior consultant relations and sales relationship managers within the North America Institutional Business Development Team
- Spearheaded the design and implementation of an Analyst and Associate “Training Program” for the North America Institutional Business Development Team

NEUBERGER BERMAN LLC

Senior Vice President, West Coast Consultant Relations

Los Angeles, CA
July 2010 - July 2014

- Actively managed relationships with research and field consultants regarding the full breadth of firm investment capabilities; Fixed Income, Equities and Alternative Investments
- Successful track record of securing “buy” ratings and revenue generation from leading consultants in the western region
- Worked closely with NB sales teams across regions and channels to cultivate relationships, develop business, and help service clients tied to all consultants on the west coast
- Participated in coordinating the messaging, branding and positioning of key NB products with global consultants
- Hosted a series of investor roundtables for west coast institutional clients & consultants to identify and develop new business opportunities

RCM CAPITAL MANAGEMENT LLC

Director, International Equity Product Specialist

San Francisco, CA
August 2008 – July 2010

- Responsible for supporting Allianz and RCM US based sales of RCM’s global and international equity capabilities out of London (\$5.2 Billion) and RCM’s Asia Pacific capabilities out of Hong Kong (\$8.6 Billion)
- Recruited by RCM in San Francisco to help raise their profile and expand US institutional business of Global and Asian Equities through consultants, public funds, corporates, endowments & foundations
- Established and executed strategy with RCM Consultant Relations Team for RCM’s flagship Global Equity Strategy
- Represented the portfolio managers as the US “expert” in client reviews and new business presentations across client channels for RCM’s Global and Asian Equities

- Oversaw business and operational management within the US market with respect to overseas RCM products
- Developed and maintained credible, compelling, and timely product communications for Allianz and RCM
- Worked closely with the investment teams in London and Hong Kong for product integrity

CREDIT SUISSE ASSET MANAGEMENT LIMITED

Client Portfolio Manager, Emerging Market Equities

**London/Zurich
August 2006 – June 2008**

- Product Specialist for Emerging Market Equities managed out of New York, London and Singapore
- Client facing specialist for \$10.2 billion in assets across regional, country and sector strategies
- Coordinated efforts with internal Credit Suisse marketing and sales teams globally to both broaden and grow the firm's emerging market equity business
- Directed and implemented product road-shows, client servicing, marketing materials and new product launches

CREDIT SUISSE ASSET MANAGEMENT LIMITED

Head of UK Consultant Relationships

**London, UK
September 2005 – August 2006**

- Relationship manager responsible for maintaining and developing key relationships with global and local consultants
- Presented Credit Suisse Asset Management capabilities to investment consultants for business development and revenue generation
- Developed and executed multi-strategy campaigns to market Credit Suisse products to the institutional marketplace
- Member of internal Global and European Consultant Committees
- Championed CS investment products across the asset management sales/marketing channels in the UK and Europe
- Represented CS at industry and consultant-sponsored conferences in the UK

CREDIT SUISSE ASSET MANAGEMENT LLC

Senior Relationship Manager, Consultant Development

**New York, NY
July 2001 – August 2005**

- Relationship manager responsible for global, national and regional consultants
- Presented investment management capabilities across a myriad of traditional and alternative asset classes to research and field consultants for revenue generation/client retention
- Developed and executed multi-strategy campaigns to market CSAM products to the consultant community
- Represented CSAM at industry and consultant-sponsored conference

JPMORGAN INVESTMENT MANAGEMENT

Consultant Sales Team

**New York, NY
December 1999 – July 2001**

- Organized and conducted meetings between consultants and portfolio managers
- Pioneered new relationships with regional consulting firms
- Identified potential sales opportunities through investment consultants
- Responded to inquiries from consultants on investment management services
- Initiated and oversaw the writing of "FOCUS," a quarterly publication for investment consultants

CALLAN ASSOCIATES, INC.

Investment Analyst, Global Manager Research

**San Francisco, CA
February 1998 – November 1999**

- Interviewed investment managers as part of due diligence for clients
- Participated in weekly Manager Search call to review investment managers with Plan Sponsor and GMR consultants
- Conducted analysis and created reports comparing investment manager capabilities
- Monitored investment portfolio statistics for U.S. and International equity managers
- As part of an eight-person equity research team, placed equity assets of \$6.5B in 1998 and \$3.4B in 1999
- Executed performance measurement and style analysis on all asset classes and styles for ICG clients

EDUCATION

UNIVERSITY OF ST ANDREWS

Master of Arts in Classical Studies with Honours

**St. Andrews, Scotland
1998**

ADDITIONAL INFORMATION

Held Series 7, 31 & 66 licenses (expired June 2021)
Possess European Economic Community Passport – Republic of Ireland