



Town of Palm Beach Application for Service

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APR 09 2024

Town Clerk's Office

* Denotes a required field

Profile

First Name *

Kathleen

Middle Initial

M

Last Name *

Anderson

Home Address *

2650 S Ocean Blvd

Apt 401w

City *

Palm Beach

State *

FL

Postal Code *

33480

Email Address *

Kmq2658@aol.com

Primary Phone *

Home

609-915-9318

Alternate Phone

Home

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**

verified
KMC
4/9/24

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** All except 1

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** None

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

Go to Question

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

Occupation

Retired

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? *

Worked on Wall Street for nearly 40 years. A portfolio manager/analyst focused on income producing securities.

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.

Currently serve on the IAC board and seeking re-election

Question applies to Investment Advisory Committee

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

Career investment focus has been on income producing securities. Also, protecting client assets on the downside but still participating on the upside with limited risk

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

None selected ▾ PB Civic Association

Present Occupation

Retired

No. of years

8 years

Past occupation(s)

Portfolio manager and analyst entire career. Majority of my career spent at Merrill Lynch and then BlackRock following acquisition of ML

No. of years

About 40

Please provide details regarding your educational background:

Focus on economics and finance. BBA in economics and finance from Baruch College and did some graduate coursework at NYU

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 *don't like this statement*
some issues walk with cane

☐ 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.

☒ 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/3858967?code=08ff9610-bd9f-4726-86ae-

df9a6244da02) [Submit](#)

[View as PDF/Print \(/boards/forms/693/apply/3858967.pdf?code=08ff9610-bd9f-4726-86ae-df9a6244da02&no_redaction=true\)](#)

[Save for later](#)

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☒ I Agree

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