

Town of Palm Beach Application for Service

RECEIVEDAPR **0 9** 2024

Town Clerk's Office

* Denotes a required field

Profile

First Name *	Middle Initia	al
Kathleen	M	
Last Name *		
Anderson		
Home Address *		
2650 S Ocean	31vd	
Apt HOIW		
City *	State *	Postal Code *
Palm Beach	71	33480
I Will Back		

Email Address *

Primary Phone *

Home

Log-915-931g

Alternate Phone

Which Boards would you like to apply for? *

A 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 Allexcept 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**

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			
of residency shall be grounds to reject shall be either a copy of your Floridate of your residence as shown on this	n Beach residency. Failure to attach proof ect your application. Proof of residency a's Driver's License matching the address application, a copy of a utility bill in your wn on this application, or by providing an ed Declaration of Domicile with this		
Question applies to multiple boards			
Please upload proof of residency			
	Choose file		
accepted formats: doc, docx, rtf, txt, a	and pdf		
Occupation			
Retired			
Tiotiliou			
In what area of town do you live?			
South			

Interests/Experience

Question applies to Investment Advisory Committee dillin. 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.

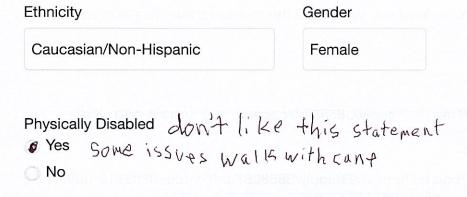
Currently serve on the	IAC board and seeking re-election
Question applies to Inves	tment Advisory Committee
Please describe your cu fixed investment experi	urrent or prior investment experience, and describe any ence you may have. *
	us has been on income producing securities. Also, s on the downside but still participating on the upside
Are you a member of ar	ny of the following organizations? (Check all that apply)
None selected	1- PB Civic Association
Present Occupation	
Retired	
No. of years	
8 years	
Past occupation(s)	
	analyst entire career. Majority of my career spent at BlackRock following acquisition of ML
No. of years	

Please provide details regarding your educational background:

Focus on economics and finance. Baruch College and did some grace	BBA in economics and finance from duate coursework at NYU
Upload a Resume	
	Choose file
Accepted file types: RTF, DOC, DOC	CX, PDF, TXT, JPG, JPEG, GIF, PNG
Have you ever been convicted or pl than minor traffic violations? * Yes No	led guilty or nolo contendere to a crime other
identify in the space below and che	vn board, commission, or committee, please ock the "I Agree" box indicating that you will appointed to the position you are seeking in
I agree that I will resign from the boa	ard, commission, or committee if I am ing in this application.
I Agree *	
	r potential conflicts of interest, please list the ork in the Town of Palm Beach, including you n. *
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.



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.



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 <u>December 15</u> 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

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.



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