



April, 2019

***Sandie Arnott** is the first woman elected to the position of Treasurer-Tax Collector of San Mateo County. She was first elected in November, 2010 and re-elected in June, 2014 & 2018*

Since her election, Ms. Arnott's priorities have been focused on improving payment processes, making them more efficient and Green. Ms. Arnott authored AB2738 which was adopted by Assemblywoman Kristen Olsen and signed into law by the Governor on 9/22/16. This new law, effective 1/1/17, dis-allows school districts and community college districts from claiming bond proceeds as surplus fund. This law protects taxpayer dollars by ensuring they remain in the treasury and are withdrawn solely for the projects stated within the bond measure presented to voters. Ms. Arnott went live on 9/3/19 with a new property tax system (TaxSys) by the Grant Street Group and is the first county in California to implement their system. .

Ms. Arnott currently serves as a member of the San Mateo County Treasury Oversight Committee; Ex-Officio Trustee and Chair of the San Mateo County Employees Retirement Association (SamCERA) Investment Committee; Immediate Past President of the California Association of County Treasurers & Tax Collectors (CACTTC). She was selected by State Treasurer Betty Yee to serve on a special Property Tax Procedures Manual Committee and was selected by the California State Association of Counties (CSAC) to serve on the California Debt Investment Advisory Committee (CDIAC) steering committee. Ms. Arnott was recently selected to serve on the Legislative Committee of the National Association of County Collectors, Treasurers and Finance Officers (NACCTFO) and also serves as the California Liaison. She is a Director on the board of the North Peninsula Food Pantry & Dining Center of Daly City. She served as President of Women in County Government in 1997-98.

**Bret Black**

Bret Black is the Principal Treasury Investment Officer for the County of Kern. Bret's primary responsibilities involve managing the three-billion dollar investment portfolio for the County, Schools Districts, Special Districts and other voluntary participants throughout the County of Kern. Bret has ten years of investment management experience, spending the last five years acting in this role with the County and prior to that he spent Five years as an investment advisor. He is a graduate of California State University Bakersfield and is a CFA Level 2 candidate.



Spencer Bridgers works as the Program Director for Revenue Recovery in NACo's Financial Services Corporation. She has worked there for 3 years on a national tax-refund intercept program. She has previously worked for the Geneva Centre for Security Policy, the United States Council for International Business and the Global Apprenticeships Network.

Spencer holds a bachelor's degree in American History from the University of North Carolina and a master's degree in International Affairs from the Graduate Institute of International and Development Studies in Geneva, Switzerland.

Greg Fayvilevich

Senior Director, Head of U.S. Fund & Asset Manager Ratings

Mr. Fayvilevich is the U.S. head of Fitch Ratings' Funds Group, based in New York. The group covers private equity finance and securitizations, and is responsible for assigning and maintaining ratings, developing rating methodologies and models, and publishing research on the sector.



Homeland Security Biography

Jennine Gilbeau

Cybersecurity Advisor, Region IX (CA, NV, AZ, HI, GU)
Cybersecurity and Infrastructure Security Agency
Stakeholder Engagement and Cyber Infrastructure
Resilience



Ms. Gilbeau serves as Cybersecurity Advisor, Region IX, for the Stakeholder Engagement and Cyber Infrastructure Resilience (SECIR) division of the Cybersecurity and Infrastructure Security Agency (CISA). She supports the Department of Homeland Security (DHS) mission of strengthening the security and resilience of the nation's critical infrastructure. She manages a program to coordinate cyber preparedness, risk mitigation and incident response, and provides cybersecurity resources, including assessments, to the nation's 16 critical infrastructure sectors and state, local, tribal, and territorial government entities.

An experienced federal government employee for over 30 years, Ms. Gilbeau was previously the Chief of National Cyber Exercise and Planning Program (NCEPP) within the National Cybersecurity and Communications Integration Center (NCCIC). Operationally-focused, her team prepared partners to respond in a coordinated fashion to complex scenarios. Her diverse background includes capabilities honed in the Department of Defense (DoD): Army – Information Assurance Branch Chief and Command Privacy Official, Strategic Planner, Information Technology Manager, COOP Planner, and Program Analyst; Marine Corps – Regional Program Manager for Navy/Marine Corps Internet (NMCI) transition, Network Administrator and Program Manager; and Navy – Human Capital Manager, Budget Analyst and Network Administrator.

A graduate of Harvard's Kennedy School, Senior Executive Fellows Program, Ms. Gilbeau holds a Computer Science degree and has the following certifications: CISM; GIAC; CEH; and Security+.

**Karen M Helms**

Karen M Helms is the Assistant Treasurer – Tax Collector for Merced County. Karen has more than 15 years working in both Mariposa and Merced County. Her increasing responsibilities include accounting and analytical positions in Human Services, Auditor-Controller and Treasurer-Tax Collector offices. Her most notable recent accomplishments include the cost analysis that supported closing of the collection department for outsourcing, extensive work with CSAC-FS and NACO as one of two pilot counties for CalTRECS, and maneuvering through two difficult bankruptcy issues for a win. Karen is the Chair of the Bankruptcy Committee and a member of the Treasury Committee.

In addition to her experience in government, Karen has over 20 years in the private sector accounting field. Karen, her husband James and their four cats live in Merced.

Angelica Hernandez

Manager, Policy Research Unit, California Debt and Investment Advisory Commission

California Debt and Investment Advisory Commission Angelica.Hernandez@treasurer.ca.gov

Angelica Hernandez is the manager of the California Debt and Investment Advisory Commission's (CDIAC) Policy Research Unit. At CDIAC she has managed and participated on numerous projects including writing a three-part series on Public Private Partnerships, leading the 2009 update to the Investment Primer, and oversees the annual update to the Local Agency Investment Guidelines (LAIG). Prior to her time at CDIAC, she was a staff loan officer with the California Infrastructure and Economic Development Bank.

Currently, she serves as a member of the Sacramento County Treasury Oversight. She is a graduate of the University of California, Davis.



Eric Hiatt, CFA, FRM

Managing Director, Portfolio Manager

Eric D. Hiatt, CFA, FRM, Managing Director, is a Portfolio Manager within BlackRock's Cash Management Group. As a member of the Trading & Liquidity Strategy (TLS) team, he contributes to the development and implementation of investment strategy and serves as portfolio lead for the U.S. Prime funds, Collective Trust Funds and securities lending cash collateral.

Prior to joining BlackRock in 2012, Mr. Hiatt was a Senior Portfolio Manager at Dwight Asset Management Company where he was responsible for generating and directing tactical trading for the money market and ultra-short duration desk. Prior to joining Dwight in 2009, Mr. Hiatt was a Senior Portfolio Manager at Lehman Brothers Asset Management where he spent six years assisting in the development of portfolio strategy and implementation of investment objectives for global cash management team. Previously, he spent five years as a trader and assistant portfolio manager for Opus Investment Management. Mr. Hiatt began his career as an analyst in the Treasury group for Eastern Enterprises, a utility holding company, in 1997.

Mr. Hiatt earned a BS in finance from Bentley University in 1997 and an MBA from Boston College's Carroll School of Management in 2006. He is a member of the CFA Institute and the Global Association of Risk Professionals.

Matthew Jennings

Assistant Treasurer-Tax Collector Riverside County Treasurer-Tax Collector

Matt Jennings joined the Riverside County Treasurer-Tax Collector's office in May of 1994 as a phone agent in the Public Services unit. Throughout his 25-year career he promoted through several positions within the department and was appointed to his current position of Assistant Treasurer-Tax Collector in August of 2017.

Until the most recent appointment, Jennings had overseen a staff of over 40 employees directly and indirectly through subordinates. He was responsible for the day to day operations of 5 Public Services units including satellite locations and the Unsecured Tax Enforcement unit. He now oversees a department of approximately 100 employees and the entire billing and collection process of over \$3.5 billion in annual property taxes.

Jennings earned a Bachelor of Science degree in Management from Hope International University and is a lifelong resident of Riverside County.



Guyna G. Johnson

Director

Financial Institutions Department – Global Funds Rating Group

Guyna G. Johnson is Director within the Global Funds Rating Group and is responsible for analyzing ratings of various managed portfolios of fixed income assets including money market, bond, and offshore funds, as well as government investment pools. Previously, Guyna was a member of the U.S. Structured Finance Group, where she served as the analytical manager for municipal synthetic structures. Before joining S&P Global, Guyna served a federal judicial clerkship with the Honorable Charles M. Caldwell, U.S. Bankruptcy Court, Southern District of Ohio (Columbus).

She holds a Juris Doctor from The Ohio State University Moritz College of Law and a Bachelor of Science, *cum laude*, in Mathematics from Jackson State University, MS. While at The Ohio State, Guyna served as a member of the Ohio State Journal of Dispute Resolution. Currently, she is a member of the State Bar of Georgia and the District of Columbia Court of Appeals Bar.



John Johnson

Chief Deputy Treasurer

John Johnson joined the San Bernardino County Treasury Division in 2004 and was appointed Chief Deputy Treasurer in 2008. He has also served as Assistant Auditor-Controller/Treasurer/Tax Collector. Prior to his County service, Mr. Johnson spent 15 years in the private sector as a registered securities representative. He holds a Bachelor of Science degree in Business Administration from the University of Southern Mississippi and is an active member of the California Association of County Treasurers and Tax Collectors, the California Municipal Treasurers Association, and the Investment Managers of Public Agencies Council.



Bio for Jordan Kaufman

On January 5, 2015, Jordan Kaufman assumed the elected office of the Kern County Treasurer and Tax Collector. As Treasurer-Tax Collector, Jordan has the fiduciary responsibility of safeguarding and investing over \$3.0 billion in public funds in the County Treasury Investment Pool and annually collecting over \$1.0 billion in local property taxes. Jordan is also the Plan Administrator for the \$520 million deferred compensation plan for County employees. Prior to getting elected, Jordan was the assistant Treasurer-Tax Collector since 2006. Prior to 2006, he spent over a decade working in the County Administrative Office in the Budget and Finance Division where he performed budget and policy analysis for various County departments and was involved in the issuance of various types of municipal bonds for the County including Certificates of Participation (COPs), Tax and Revenue Anticipation Notes (TRANS), Lease Revenue bonds and Pension Obligation Bonds (POBs).

He is currently the Second Vice President of the California Association of County Treasurers and Tax Collectors (CACTTC), Treasurer and past Chairman of the United Way of Kern County, ex officio trustee and current Board Chair of the Kern County Employees Retirement Association (KCERA), Commissioner on the California Statewide Communities Development Authority (CSCDA), Treasurer of the Boy Scouts of America Southern Sierra Council, and member of the Kern County Hispanic Chamber of Commerce.

Jordan is also an Adjunct Professor at CSUB where he teaches a graduate level Public Budgeting and Finance course for the Department of Public Policy and Administration.

Jordan has a Bachelor of Science degree in Industrial Technology from the California Polytechnic State University at San Luis Obispo (Cal Poly) and has a Certified Public Funds Investment Manager designation from the Association of Public Treasurers (APT).



Karen Lange

Following ten years of working with the firm's partners and staff as a legislative advocate, Karen Lange became a partner in 2016. Since beginning her career in public policy as a Congressional intern in 1998, Karen's vast expertise has evolved to encompass policy related to energy, health, agriculture, water, local government, and, most recently, animal welfare and the aftermarket auto industry.

Karen first came to the firm's attention in 2006, when she began working as an advocate with Peterson Consulting, Inc., which maintained a long-standing strategic partnership with Joshua Shaw and Paul Yoder, who eventually purchased Peterson Consulting in 2009.

Prior to becoming an advocate, Karen served two separate stints as a staff member in the California State Assembly, including time as Legislative Director for a member of the Assembly. In between, she worked for Navigant Consulting, which was advising the State of California on energy contracts procured by the state.

Karen holds a Bachelor's Degree in Political Science from the University of California, Berkeley. She resides in Sacramento with her husband Alan and son Griffin.

Greg Litster

President, SAFEChecks

Greg Litster is President of SAFEChecks, a company specializing in fraud prevention. Mr. Litster was in banking for 18 years, holding various executive-level positions before founding SAFEChecks in 1996. Mr. Litster produces the Abagnale Fraud Bulletin, has given hundreds of fraud prevention seminars, and is a check fraud/embezzlement expert witness.

Barbara Lopez

Del Norte County Treasurer-Tax Collector

Barbara Lopez is the Del Norte County Treasurer-Tax Collector. Barbara joined the Tax Collector's Office in February 2000. During her 19 years in the office, Barbara has served many rolls in the department such as Senior Accountant, Chief-Deputy Tax Collector and Administrative Analyst. She was promoted to the Assistant Treasurer-Tax Collector in 2010, and after 5 years was elected to Office and is currently in her 2nd term as Treasurer-Tax Collector.

Barbara implemented the Unsecured Collection Program for her County. Over the years, the program has been very successful in generating revenue for the County and eliminating much of the unsecured delinquency for the Department. Collection enforcements include FTB Offset Program, Bank Seizures, Personal Property Seizures and most recently Mobile Home Seizure and Sales.

In her County, Barbara serves on the Proactive Financial Goals Committee, Grants and Housing Committee and Future Facilities Committee. Because she loves animals and her community, she is also the Secretary for the Humane Society of Del Norte County.

Barbara is a member of many committees through CACTTC and is currently serving as the Chair of the Mobile Home Committee.

Marty Margolis
Managing Director
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**Carlos Oblites**

Senior Vice President, Portfolio Strategist

Carlos Oblites is a Senior Vice President and Portfolio Strategist at Chandler Asset Management. He is responsible for building and maintaining client relationships with public agencies along with participating actively in the portfolio management process. Carlos has over 20 years of investment and financial experience, focused largely on managing short-term fixed income and pension strategies for governmental and institutional non-profit clients.

Prior to joining Chandler, Carlos served as the Administrative Services Manager at Central Marin Sanitation Agency (CMSA) and was responsible for all aspects of the Agency's financial, human resources, administrative support, and information systems activities. He also has significant expertise in serving California public agencies, healthcare, and insurance clients through his roles as Director at PFM Asset Management, and as a Principal at Wells Capital Management. Previous responsibilities include managing a variety of institutional client relationships and developing, implementing, and monitoring customized investment strategies for operating funds, bond proceeds, pension, and post-retirement funds. Carlos has also worked as a marketing/research consultant with Wells Fargo Bank and as teacher for the Long Beach Unified School District.

Carlos holds a Bachelor of Arts degree in History from the University of California, Santa Barbara, and earned a Master's degree in Business Administration from San Francisco State University

John Palmer
Partner, Public Finance, Orrick, Herrington & Sutcliffe LLP





Marika Rose

Marika Rose Communications

Marika works with corporations, associations, institutions and nonprofits to establish and build support for policy initiatives, civic projects, and thought leadership through positive media attention and publicity, effective community and industry outreach. Over more than 20 years she has developed valuable relationships with editors and reporters at major dailies, political and industry publications, and with broadcast assignment editors and producers to help clients tell their stories and influence policy.

Marika has provided communications and media support to a wide range of organizations, including UC Merced, City of Sacramento, San Joaquin County, B Street Theatre, California K-12 Civic Learning Initiative, CalEITC, Woodland Research Park, AKT Investments, SKK Developments, California School Boards Association, California Association of County Treasurers and Tax Collectors, Opportunity Fund, and California Competes.



Tim Schaefer is a Deputy Treasurer for Public Finance for California Treasurer Fiona Ma. His duties include executive oversight responsibility for the Treasurer's Investment Division, which manages a \$90 billion portfolio, including the state's Local Agency Investment Fund; the Public Finance Division, which manages the State's \$85 billion debt portfolio; and, the Centralized Treasury Division, which handles nearly \$2.0 trillion of payments annually and maintains hundreds of bank accounts for the State.

Before entering State service, Tim was the principal owner of Magis Advisors, a public finance consulting firm in Orange County, California. He has more than fifty years of experience in the municipal securities industry. That past experience includes managing the Public Finance Division of Bank of America in San Francisco and the national municipal short-term trading desk at Chemical Bank in New York City.

Tim served for three years as a private sector advisor to the Standing Committee on Governmental Debt of the Government Finance Officers Association of the United States and Canada; and, he is presently serving as the Chairman of the State Debt Management Network of the National Association of State Treasurers.

He is a frequent speaker in the field of public finance.

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Lori Scott

Shasta County Treasurer-Tax Collector-Public Administrator, worked for Shasta County for 43 years.

Went to Shasta College, Sacramento State, and University of Missouri where she did continual education for Public Administration, and Finance Executive.

Lori was President for CACTTC and President for PAPGPC, where she has been a subject speaker for both associations.

She has been involved in most of the rewrites of the manuals for the Association of the CACTTC (Unsecured, Secured, TOT, etc.)