

FORM ADV**Uniform Application for Investment Adviser Registration****Part II - Page 1****OMB APPROVAL**

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Hours per response.....4.07

Name of Investment Adviser:						
Address:	(Number and Street)	(City)	(State)	(Zip Code)	Area Code:	Telephone Number:

**This part of FORM ADV gives information about the investment adviser and its business for the use of clients.
The information has not been approved or verified by any government authority.**

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(Schedule A, B, C, D, and E are included with Part I of this Form, for the use of regulatory bodies, and are not distributed to clients.)

Potential persons who are to respond to the collection of information contained in this form
are not required to respond unless the form displays a currently valid OMB control number.

Applicant:

SEC File Number:

Date:

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1. A. Advisory Services and Fees. (check the applicable boxes)

For each type of service provided, state the approximate % of total advisory billings from that service. (See instruction below.)

Applicant:

- | | | |
|------------------------------|--|---------|
| <input type="checkbox"/> (1) | Provides investment supervisory services | _____ % |
| <input type="checkbox"/> (2) | Manages investment advisory accounts not involving investment supervisory services..... | _____ % |
| <input type="checkbox"/> (3) | Furnishes investment advice through consultations not included in either service described above... | _____ % |
| <input type="checkbox"/> (4) | Issues periodicals about securities by subscription | _____ % |
| <input type="checkbox"/> (5) | Issues special reports about securities not included in any service described above..... | _____ % |
| <input type="checkbox"/> (6) | Issues, not as part of any service described above, any charts, graphs, formulas, or other devices which clients may use to evaluate securities..... | _____ % |
| <input type="checkbox"/> (7) | On more than an occasional basis, furnishes advice to clients on matters not involving securities... | _____ % |
| <input type="checkbox"/> (8) | Provides a timing service | _____ % |
| <input type="checkbox"/> (9) | Furnishes advice about securities in any manner not described above..... | _____ % |

(Percentages should be based on applicant's last fiscal year. If applicant has not completed its first fiscal year, provide estimates of advisory billings for that year and state that the percentages are estimates.)

- | | | |
|--|------------------------------|-----------------------------|
| B. Does applicant call any of the services it checked above financial planning or some similar term? | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
|--|------------------------------|-----------------------------|

C. Applicant offers investment advisory services for: (check all that apply)

- | | |
|---|--|
| <input type="checkbox"/> (1) A percentage of assets under management | <input type="checkbox"/> (4) Subscription fees |
| <input type="checkbox"/> (2) Hourly charges | <input type="checkbox"/> (5) Commissions |
| <input type="checkbox"/> (3) Fixed fees (not including subscription fees) | <input type="checkbox"/> (6) Other |

D. For each checked box in A above, describe on Schedule F:

- the services provided, including the name of any publication or report issued by the adviser on a subscription basis or for a fee
- applicant's basic fee schedule, how fees are charged and whether its fees are negotiable
- when compensation is payable, and if compensation is payable before service is provided, how a client may get a refund or may terminate an investment advisory contract before its expiration date

2. Types of clients - Applicant generally provides investment advice to: (check those that apply)

- | | |
|--|---|
| <input type="checkbox"/> A. Individuals | <input type="checkbox"/> E. Trusts, estates, or charitable organizations |
| <input type="checkbox"/> B. Banks or thrift institutions | <input type="checkbox"/> F. Corporations or business entities other than those listed above |
| <input type="checkbox"/> C. Investment companies | <input type="checkbox"/> G. Other (describe on Schedule F) |
| <input type="checkbox"/> D. Pension and profit sharing plans | |

Answer all items. Complete amended pages in full, circle amended items and file with execution page (page 1)

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3. Types of Investments. Applicant offers advice on the following: (check those that apply)

- | | |
|---|---|
| <input type="checkbox"/> A. Equity securities | <input type="checkbox"/> H. United States government securities |
| <input type="checkbox"/> (1) exchange-listed securities | <input type="checkbox"/> I. Options contracts on: |
| <input type="checkbox"/> (2) securities traded over-the-counter | <input type="checkbox"/> (1) securities |
| <input type="checkbox"/> (3) Foreign issuers | <input type="checkbox"/> (2) commodities |
| <input type="checkbox"/> B. Warrants | <input type="checkbox"/> J. Futures contracts on: |
| <input type="checkbox"/> C. Corporate debt securities (other than commercial paper) | <input type="checkbox"/> (1) tangibles |
| <input type="checkbox"/> D. Commercial paper | <input type="checkbox"/> (2) intangibles |
| <input type="checkbox"/> E. Certificates of deposit | <input type="checkbox"/> K. Interests in partnerships investing in: |
| <input type="checkbox"/> F. Municipal securities | <input type="checkbox"/> (1) real estate |
| <input type="checkbox"/> G. Investment company securities: | <input type="checkbox"/> (2) oil and gas interests |
| <input type="checkbox"/> (1) variable life insurance | <input type="checkbox"/> (3) other (explain on Schedule F) |
| <input type="checkbox"/> (2) variable annuities | <input type="checkbox"/> L. Other (explain on Schedule F) |
| <input type="checkbox"/> (3) mutual fund shares | |

4. Methods of Analysis, Sources of Information, and Investment Strategies.

A. Applicant's security analysis methods include: (check those that apply)

- | | |
|--|--|
| (1) <input type="checkbox"/> Charting | (4) <input type="checkbox"/> Cyclical |
| (2) <input type="checkbox"/> Fundamental | (5) <input type="checkbox"/> Other (explain on Schedule F) |
| (3) <input type="checkbox"/> Technical | |

B. The main sources of information applicant uses include: (check those that apply)

- | | |
|--|---|
| (1) <input type="checkbox"/> Financial newspapers and magazines | (5) <input type="checkbox"/> Timing services |
| (2) <input type="checkbox"/> Inspections of corporate activities | (6) <input type="checkbox"/> Annual reports, prospectuses, filings with the |
| (3) <input type="checkbox"/> Research materials prepared by others | Securities and Exchange Commission |
| (4) <input type="checkbox"/> Corporate rating services | (7) <input type="checkbox"/> Company press releases |
| | (8) <input type="checkbox"/> Other (explain on Schedule F) |

C. The investment strategies used to implement any investment advice given to clients include: (check those that apply)

- | | |
|---|--|
| (1) <input type="checkbox"/> Long term purchases
(securities held at least a year) | (5) <input type="checkbox"/> Margin transactions |
| (2) <input type="checkbox"/> Short term purchases
(securities sold within a year) | (6) <input type="checkbox"/> Option writing, including covered options,
uncovered options or spreading strategies |
| (3) <input type="checkbox"/> Trading (securities sold within 30 days) | (7) <input type="checkbox"/> Other (explain on Schedule F) |
| (4) <input type="checkbox"/> Short sales | |

Answer all items. Complete amended pages in full, circle amended items and file with execution page (page 1)

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5. Education and Business Standards.

Are there any general standards of education or business experience that applicant requires of those involved in determining or giving investment advice to clients? Yes No
☐ ☐

(If yes, please describe these standards on Schedule F)

6. Education and Business Background.

For:

- each member of the investment committee or group that determines general investment advice to be given to clients, or
- if the applicant has no investment committee or group, each individual who determines general investment advice clients (if more than five, respond only for their supervisors)
- each principal executive officer of applicant or each person with similar status or performing similar functions.

On Schedule F, give the:

- name
- year of birth
- formal education after high school
- business background for the preceding five years

7. Other Business Activities. (check those that apply)

- ☐ A. Applicant is actively engaged in a business other than giving investment advice.
- ☐ B. Applicant sells products or services other than investment advice to clients.
- ☐ C. The principal business of applicant or its principal executive officers involves something other than providing investment advice.

(For each checked box describe the other activities, including the time spent on them, on Schedule F.)

8. Other Financial Industry Activities or Affiliations. (check those that apply)

- ☐ A. Applicant is registered (or has an application pending) as a securities broker-dealer.
- ☐ B. Applicant is registered (or has an application pending) as a futures commission merchant, commodity pool operator or commodity trading adviser.
- ☐ C. Applicant has arrangements that are material to its advisory business or its clients with a related person who is a:
- | | |
|--|--|
| <input type="checkbox"/> (1) broker-dealer | <input type="checkbox"/> (7) accounting firm |
| <input type="checkbox"/> (2) investment company | <input type="checkbox"/> (8) law firm |
| <input type="checkbox"/> (3) other investment adviser | <input type="checkbox"/> (9) insurance company or agency |
| <input type="checkbox"/> (4) financial planning firm | <input type="checkbox"/> (10) pension consultant |
| <input type="checkbox"/> (5) commodity pool operator, commodity trading adviser or futures commission merchant | <input type="checkbox"/> (11) real estate broker or dealer |
| <input type="checkbox"/> (6) banking or thrift institution | <input type="checkbox"/> (12) entity that creates or packages limited partnerships |

(For each checked box in C, on Schedule F identify the related person and describe the relationship and the arrangements.)

- D. Is applicant or a related person a general partner in any partnership in which clients are solicited to invest?.. Yes No
☐ ☐

(If yes, describe on Schedule F the partnerships and what they invest in.)

Answer all items. Complete amended pages in full, circle amended items and file with execution page (page 1)

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9. Participation or Interest in Client Transactions.

Applicant or a related person: (check those that apply)

- ☐ A. As principal, buys securities for itself from or sells securities it owns to any client.
- ☐ B. As broker or agent effects securities transactions for compensation for any client.
- ☐ C. As broker or agent for any person other than a client effects transactions in which client securities are sold to or bought from a brokerage customer.
- ☐ D. Recommends to clients that they buy or sell securities or investment products in which the applicant or a related person has some financial interest.
- ☐ E. Buys or sell for itself securities it also recommended to clients.

(For each box checked, describe on Schedule F when the applicant or a related person engages in these transactions and what restrictions, internal procedures, or disclosures are used for conflicts of interest in those transactions.)

Describe, on Schedule F, your code of ethics, and state that you will provide a copy of your code of ethics to any client or prospective client upon request.

- 10. Conditions for Managing Accounts.** Does the applicant provide investment advisory services, manage investment advisory accounts or hold itself out as providing financial planning or some similarly termed services *and* impose a minimum dollar value of assets or other condition for starting or maintaining an account?

Yes No
☐ ☐

(If yes, describe on Schedule F)

- 11. Review of Accounts.** If applicant provides investment supervisory services, manages investment advisory account, or holds itself out as providing financial planning or some similarly termed services:

- A. Describe below the reviews and reviewers of the accounts. **For reviews**, include their frequency, different levels, and triggering factors. **For reviewers**, include the number of reviewers, their titles and functions, instructions they receive from applicant on performing reviews, and number of accounts assigned each.
- B. Describe below the nature and frequency of regular reports to clients on their accounts.

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12. Investment or Brokerage Discretion.

A. Does applicant or any related person have authority to determine, without obtaining specific client consent, the:

- | | | |
|--|--------------------------|--------------------------|
| | Yes | No |
| (1) securities to be bought or sold? | <input type="checkbox"/> | <input type="checkbox"/> |
| (2) amount of securities to be bought or sold? | <input type="checkbox"/> | <input type="checkbox"/> |
| (3) broker or dealer to be used? | <input type="checkbox"/> | <input type="checkbox"/> |
| (4) commission rates paid? | <input type="checkbox"/> | <input type="checkbox"/> |

B. Does applicant or a related person suggest brokers to clients? ☐ Yes ☐ No

For each yes answer to A describe on Schedule F any limitations on the authority. For each yes to A(3), A(4) or B, describe on Schedule F the factors considered in selecting brokers and determining the reasonableness of their commissions. If the value of products, research and services given to the applicant or a related person is a factor, describe:

- the products, research and services
- whether clients may pay commissions higher than those obtainable from other brokers in return for those products and services
- whether research is used to service all of applicant's accounts or just those accounts paying for it; and
- any procedures the applicant used during the last fiscal year to direct client transactions to a particular broker in return for product and research services received.

13. Additional Compensation.

Does the applicant or a related person have any arrangements, oral or in writing, where it:

- | | | |
|---|--------------------------|--------------------------|
| A. is paid cash by or receives some economic benefit (including commissions, equipment or non-research services) from a non-client in connection with giving advice to clients? | Yes | No |
| | <input type="checkbox"/> | <input type="checkbox"/> |
| B. directly or indirectly compensates any person for client referrals? | Yes | No |
| | <input type="checkbox"/> | <input type="checkbox"/> |

(For each yes, describe the arrangements on Schedule F.)

14. Balance Sheet. Applicant must provide a balance sheet for the most recent fiscal year on Schedule G if applicant:

- has custody of client funds or securities (unless applicant is registered or registering only with the Securities and Exchange Commission); or
- requires prepayment of more than \$500 in fees per client and 6 or more months in advance

Has applicant provided a Schedule G balance sheet?..... ☐ Yes ☐ No

**Schedule F of
FORM ADV
Continuation Sheet for Form ADV Part II**

Applicant:

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(Do not use this Schedule as a continuation sheet for Form ADV Part I or any other Schedules)

1. Full name of applicant exactly as stated in Item 1A of Part I of Form ADV:

IRS Empl. Ident. No.:

Item of Form
(identify)

Answer

(Complete amended pages in full, circle amended items and file with execution page (page 1).)

Bott-Anderson Partners, Inc.

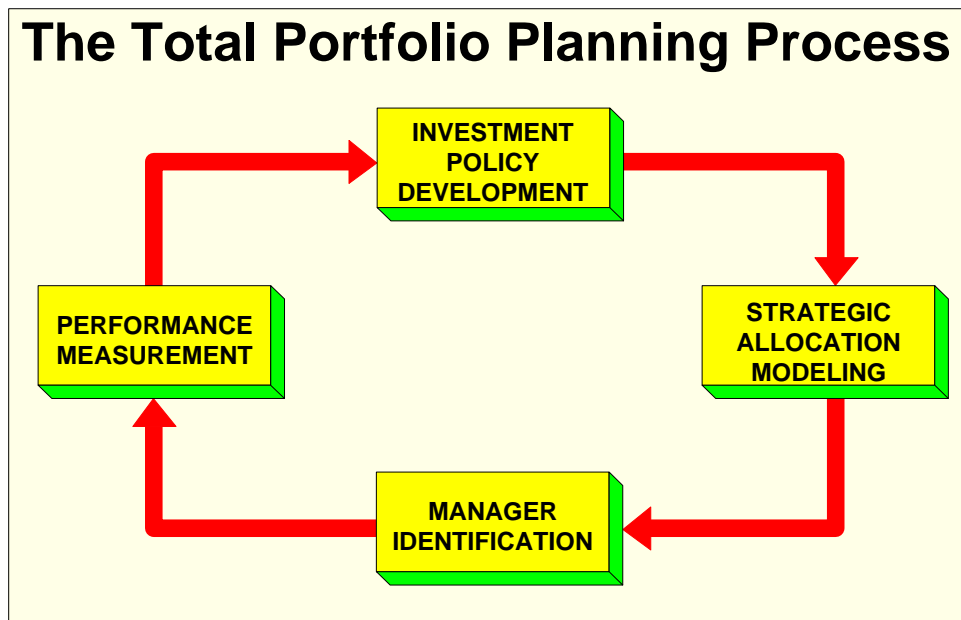
1548 The Greens Way, Suite 1
Jacksonville, Florida 32250
(904) 280-8995 – (904) 280-8996 (Fax)

Summary of Services

The Total Portfolio Planning Process is a continuous and dynamic structure. Simply providing performance measurement or manager search services does not address the overall scope of the investment process. The client and the consultant should address other portfolio management issues as well. Bott-Anderson provides clients with the information and analytical tools to help them make investment decisions while the clients provide the consultant with the objectives and constraints that the information must incorporate. Working together, the client and the consultant are able to apply their independent perspectives so that the clients' supervisory board can make value-added decisions on a timely basis.

In order to accomplish this, *The Total Portfolio Planning Process* is comprised of four broad service categories:

1. Investment Policy Development
2. Strategic Allocation Modeling
3. Manager Identification
4. Performance Measurement



Attaining a portfolio's desired objectives within a particular set of constraints requires hands-on client-driven service. Bott-Anderson has developed a highly educational process that allows the client and the consultant to exchange valuable information and work together toward the goal of maximizing asset growth. The ability to simplify what is often a complex portfolio evaluation process and the willingness to customize report findings into an easily understandable format is what sets our services apart. As Consultants, our task is to bring forth key factors that both add to and detract from a Portfolio's overall performance.

Fee-Service Schedule

Bott-Anderson Partners, Inc.
1548 The Greens Way, Suite 1
Jacksonville, Florida 32250
(904) 280-8995 – (904) 280-8996 (Fax)

Fee for Services – Ala-Carte

<i>Investment Policy Design and Implementation:</i>	\$4,000.00
Investment Policy Update / Revisions:	\$1,500.00
<i>Asset Allocation Modeling (Style Analysis)</i>	\$ 6,000.00 (First Time)
Annual Update	\$ 3,000.00
<i>Investment Manager Search:</i>	
By Investment Style (Balanced, Equity, Fixed)	\$ 6,000.00 (Each Style)
Plus Asset Allocation Modeling	\$ 3,000.00
<i>Performance Analysis (Quarterly):</i>	
First Manager	\$ 5,000.00
Second Manager	\$ 4,000.00
Third Manager	\$ 3,000.00
Fourth and Subsequent Manager	\$ 2,000.00 (Each Account)
Composite Review (Summary)	\$ 1,500.00

Full Service Fee Structure:

0.22% on the first \$10 million of investment assets
0.12% over \$10 million in investment assets

Minimum Fee: \$ 8,000.00
Maximum Fee: \$85,000.00

Start Up Cost: Varies depending on project (one-time only charge)

Services Include: Investment Policy Design & Implementation
Asset Allocation Modeling (By Investment Style)
Manager Search / Peer (Style) Analysis
Performance Evaluation (Quarterly)
Vendor Fee and Service Negotiations

401k / 403b Review Services:

Minimum Fee: \$12,000.00 / ***Maximum Fee:*** 0.10% to a maximum of \$40,000 per annum (Prorated Quarterly) Plus out of pocket expenses if travel is outside the State of Florida.

Replacement of Fund Vendor: Fee Subject to Scope of the Project.

Special Projects: \$250.00 per hour plus out-of-pocket expenses.

Referral Fee Schedule

Bott-Anderson Partners, Inc.
1548 The Greens Way, Suite 1
Jacksonville, Florida 32250
(904) 280-8995 – (904) 280-8996 (Fax)

Referral Fee Schedule

Introduction from a professional organization (i.e. accountant, attorney, etc.) will receive a referral fee as stated below:

First Year - 25% of the client's First-year fee
Second Year - 15% of the client's Second-year fee
Third Year - 10% of the client's Third-year fee
Fourth Year - Zero

All referrals will receive a letter disclosing the referral fee arrangement.

Bott-Anderson

PARTNERS, INC

Gerald F. Bott, Managing Partner

Bott-Anderson Partners, Inc. – Jacksonville, Florida 32250

(904) 280-8995 – E-mail: jbott@bottanderson.com

Gerald F. Bott is a Managing Partner of Bott-Anderson Partners, Inc. located in Jacksonville, Florida. Bott-Anderson Partners provides investment consulting to Corporate, Non-Profit and High Net Worth Individuals. Services include Investment Policy Design, Asset Allocation Modeling, Manager Search and Performance/Risk Analysis.

Jerry started his investment career as part of the Merrill Lynch's Junior Executive Program in March 1965. Following his training, Jerry was assigned to various positions in New York, London and Chicago. In June 1966, Jerry was assigned to the Oakland, California office as an Account Executive, specializing in financial instruments and commodities. Jerry was appointed Senior Account Executive and shareholder of Merrill Lynch in 1969.

From 1972 – 1973 he held a senior position with Eastman Dillon Union Securities as Partner in charge, New York Retail Sales Division. Following the merger with Blyth/INA in 1973, Jerry joined Kidder Peabody & Company, assigned to Southeast Florida. During his tenure with Kidder Peabody, Jerry became a Partner/Shareholder in 1978 and a Senior Vice President in 1979. He was also the founding member of the PRIME Consulting Services department for Kidder Peabody, founded in 1982.

Jerry rejoined Merrill Lynch in 1989 through the acquisition of Kidder Peabody (Florida Division) and its consulting group and retired from Merrill Lynch in December 2001. He is a founding director and charter member of the Investment Management Consultants Association (IMCA – 1985). Jerry served as Chairman of Development for Holy Cross Hospital in Ft. Lauderdale from 1975 through 1978, and is a former trustee for the Foundation for Health Care, Inc. and Hospice Northeast Florida (Jacksonville). Currently, Jerry is on the Advisory Board for Baptist Health System – Beaches and a member of the Scholarship Advisory Board – The University of Arizona. He is also a Director and member of the Executive Committee of the Alumni Board at the University of Arizona, consultant to the Fiscal Stability / Investments Committee, and Team Leader for External Relations which includes Merit Student Recruitment and Scholarships. Jerry is also a member of the Campaign Arizona Executive Committee, and the Presidents Council at The University of Arizona.

Jerry is active with a number of eleemosynary groups either as Trustee or Consultant. He provides services in formulating Investment Policy Procedure, Risk/Asset Allocation, Manager Selection, and Performance/Risk Analysis. Collectively, Jerry has consulted and advised charitable / corporate assets totaling \$3.5 Billion.

In 1999, Jerry was recognized in "Who's Who of Investment Management Consulting". He holds a Bachelor degree in Finance/Economics, University of Arizona (1964), and a consulting certification from the Wharton Business School (1988-89).

Bott-Anderson

PARTNERS, INC

John (Jay) K. Anderson, Jr., Managing Partner

Bott-Anderson Partners, Inc. – Jacksonville, Florida 32250

(904)-280-8995 - Email: janderson@bottanderson.com

Prior to forming Bott-Anderson Partners, from 1996 until 2002, Mr. Anderson was Executive Vice President, Treasurer, and Chief Financial Officer for American Heritage Life Investment Company of Jacksonville, Florida. American Heritage was a NYSE listed group of life insurance companies until late 1999 when it was acquired by Allstate. AHL offers a full-line of life and voluntary health, disability and accident products, marketed primarily at the workplace. Total assets in 2002 exceeded \$2.9 billion.

From 1993 through 1995, Mr. Anderson was the Chief Executive Officer at E.G. Baldwin & Associates, Inc. in Cleveland, Ohio. Baldwin is the dominant regional distributor of medical imaging products and services to hospitals and other medical providers in the six-state region from central Michigan to New Jersey.

From 1990 to 1993 Mr. Anderson was President and Chief Executive Officer at Capitol American Financial Corporation in Cleveland. Capitol American was a life and supplemental health insurance company whose products consist primarily of cancer, accident, and heart insurance. It had 300 home office employees and over 2,000 producing agents in 47 states and two US territories. Mr. Anderson took Capitol American public in 1992 through an initial public offering of stock which traded on the NYSE.

Mr. Anderson served as Executive Vice President and Chief Financial Officer for Baptist Health Systems, Inc. of Jacksonville from 1984 to 1990. Baptist Health Systems at that time was a \$400 million healthcare system, which included three not-for-profit hospitals, diversified for-profit health products and services company and an active foundation.

From 1982 to 1984, Mr. Anderson held the position of Senior Vice President and co-manager of all healthcare investment banking activities for the southeastern United States for Underwood, Neuhaus & Company, Inc. of Jacksonville, Florida. From 1976 to 1982 Mr. Anderson served as Senior Vice President/manager of William G. Ceas & Company, a healthcare investment banking firm in Rolling Meadows, Illinois. Prior to that, Mr. Anderson was a certified public accountant and senior auditor and consultant with Ernst & Ernst of Chicago, Illinois.

Mr. Anderson is a registered financial principal with the National Association of Security Dealers, a Chartered Life Underwriter (CLU), and a past certified public accountant. He is also Chairman of the Audit Committee and a member of the board of directors of both FPIC Insurance Group (FPIC), a Jacksonville-based publicly traded medical malpractice insurance company, and CNL Bank – First Coast, a Jacksonville-based commercial bank. Mr. Anderson is also a senior advisor to Brown Gibbons Lang & Company, a Cleveland, Ohio based full-service investment banking organization.

Mr. Anderson serves in leadership positions in a number of civic organizations. He is chairman of the board of Baptist Beaches Medical Center. He is a past treasurer of the Jacksonville Chamber of Commerce, past member of the board of directors for the American Cancer Society of Jacksonville Beach, past member of the board of directors for the Catholic Foundation of the Diocese of St. Augustine and past treasurer of the board of directors of the MS Society of North Florida.

Mr. Anderson graduated from the University of Notre Dame with a bachelor's degree in Business Administration/Accounting followed by a Masters Degree (Double Major) in Finance/Industrial Relations from Northwestern University.

Bott-Anderson

PARTNERS, INC

Timothy J. Anderson, Managing Director
Bott-Anderson Partners, Inc. – Jacksonville, Florida 32250
(904)-280-8995 - Email: tanderson@bottanderson.com

Prior to joining Bott-Anderson Partners, **Timothy J. Anderson** was a practicing attorney specializing in medical malpractice defense and commercial defense litigation. He was responsible for all aspects of litigation, from pre-suit negotiation, oral arguments, trial and post trial appeals and resolution. His caseload included both State and Federal jurisdictions.

Prior to law school, from 2000 through 2002, Mr. Anderson served as a Legislative Assistant and Military Legislative Aide on Capitol Hill in Washington, D.C., working with Congressman Ander Crenshaw and later with Congressman John L. Mica. He was the aide exclusively charged with the development of policy positions and legislative drafting for the areas of Banking, Finance, Tax, Budget, Small Business, Healthcare, Social Security, Regulatory Reform and Economic Development. Furthermore, Mr. Anderson was the liaison between the Office of Congressman John L. Mica and the United States Department of Defense, responsible for the military budget authorization and appropriation cycles.

From 1999 through 2000, Mr. Anderson was a Senior Associate within the Business Advisory Services group of PricewaterhouseCoopers. He was selected as one of 65 out of 3,000 to participate in the firm's only nationally accelerated manager program. While at PricewaterhouseCoopers Mr. Anderson serviced multiple Fortune 500 audit clients including Siemens, Tyco, Allmerica Financial, Citistreet, and State Street Funds. He participated in the acquisition of Siemens' Components Division by Tyco, a \$1.1 billion cash deal.

Mr. Anderson graduated from the Boston College School of Management Honors Program with a degree in accounting and finance. He obtained a General Course Degree from the London School of Economics in 1997. Mr. Anderson is a graduate of the University Of Florida Levin College Of Law, and is a member of the Florida bar. Most recently, Mr. Anderson completed an executive course in Investment Strategies and Portfolio Management at the University of Pennsylvania Wharton School of Management.

Mr. Anderson is actively involved in the community with multiple pro-bono clients. He regularly guest lectures at the University Of Florida Levin College Of Law on the topic of advanced financial statement analysis. He and his wife, Brooke, have one child and reside in Jacksonville, Florida.