

Part 2B of Form ADV (Brochure Supplement)

Ash Benzo **Brochure Supplement (Part 2B of Form ADV)** **Education and Business Standards**

Ash Benzo requires that employed advisors have a bachelor's degree and business experience with knowledge of corporate finance, securities analysis, portfolio management or securities brokerage. Examples of acceptable coursework include: an MBA, MPA, a CFP®, a CFA, a ChFC, JD, CTFA, EA or CPA. Additionally, advisors must have work experience that demonstrates their aptitude for financial planning and/or investment management.

Treasurer, 2016 - Present

Employer: City of Fort Lauderdale

- Oversee Broward County's largest City's Cash, Investment and Pension Portfolio (\$1.8B) and Debt Portfolio (\$800M).
- Authored and Passed City Resolution #16-223 designed to generate additional investment revenue for the City
- Created the City's new Cash Management investment strategy
- Revised and implemented the City's new Debt Policy
- Managed the debt issuance for the City's new pilot Energy Savings plan.

Treasurer- Debt/Treasury Manager 2015

Employer: City of Cape Coral

- Manage Florida's **3rd largest** (by size) City's Cash (\$150M), Investment (\$300M) and Debt Portfolio (\$900M).
- Authored the City's new Short-Term Cash Management Strategy
- Created the City's first Ladder Strategy Investment program designed to match Debt Payments to Investment maturities, resulting in substantially higher yields.
- Managed the State of Florida's **First** combined Bank Loan and Bond Issuance \$160M+
- Managed the procurement of a \$13.5M **Bank loan** for General equipment and Fleet Vehicles
- Managed the procurement of a \$1.5M **Bank loan** for the purchase of fire trucks
- Updated and revised the City's Debt Management and Investment Policies.

Government Finance Manager – Municipal Finance 2004 – 2014

Employer: ASNF Financial

- Provided Financial Consultation to Governments and Municipalities. Specialized in the development and administration of Debt policies, Cash Management & Investment strategies in addition to revenue accounting, budgeting and **Forecasting**.

Finance Manager – Treasury Department 2002 – 2003

Employer: United Parcel Service

- Finance Manager in \$13B Treasury Department

Senior Financial Analyst – Municipal Finance 2000 – 2002

Employer: CitiGroup – Investment Banking – Wall Street

- Designed Debt, Investment and Cash Management strategies for Municipalities, Governments & Cities

Education

New York University

MPA , Financial Management of Governments/Treasury – 3.7 GPA

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Morehouse College

BA , Finance, #1 Finance Graduate, Summa Cum Laude, Phi Beta Kappa – 3.83 GPA

Certifications, License, Language Skills and Awards

Completed Bank sponsored Investments, Accounting & Finance Training Program

Investment Advisor & Principal Financial Investments Securities License 65, 26, 6 and 63

Certified Treasury Professional designation

Proficient in Treasury & Debt Management Systems: **Sympro**, Bloomberg, Advantguard, AIM, etc

Coca Cola Achievement Award Winner

Speak, write or read: **English, Spanish and Mandarin**

Other Business Activities: Treasury – City of Fort Lauderdale

Additional Compensation: None

Arbitration Claims: None

Self-Regulatory Organization or Administrative Proceeding: None

Bankruptcy Petition: None