

## Part 2B of Form ADV (Brochure Supplement)

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### ***Municipal Cash Management Brochure Supplement (Part 2B of Form ADV)*** **Education and Business Standards**

Municipal Cash Management 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

**Vice President, 2016 - 2017**

Employer: BankUnited

**Debt/Treasury Manager 2015**

Employer: City of Cape Coral

**Finance Manager - 2004 – 2014**

Employer: ASNF Financial

**Finance Manager – Treasury Department 2002 – 2003**

Employer: United Parcel Service

**Senior Financial Analyst – Investment Banking 2000 – 2002**

Employer: CitiGroup

**Senior Financial Analyst – Investment Banking 1999**

Employer: Salomon Smith Barney

**Education**

**New York University**

Masters of Public Administration

**Morehouse College**

BA, Major Finance/Minor Economics

Other Business Activities: Treasury – City of Fort Lauderdale

Additional Compensation: None

Arbitration Claims: None

Self-Regulatory Organization or Administrative Proceeding: None

Bankruptcy Petition: None