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CLERK BOARD OF SUPERVISORS
CONTRA COSTA CO.

Print Form

Contra
Costa
County

Please return completed applications to:
Clerk of the Board of Supervisors
651 Pine St., Room 106
Martinez, CA 94553
or email to: ClerkofTheBoard@cob.cccounty.us

BOARDS, COMMITTEES, AND COMMISSIONS APPLICATION

First Name: Larry
Last Name: Fernandes
Home Address - Street:
City: Walnut Creek
Zip Code: 94598
Phone (best number to reach you):
Email:
Resident of Supervisorial District: District IV

EDUCATION *Check appropriate box if you possess one of the following:*

- [x] High School Diploma
- [ ] CA High School Proficiency Certificate
- [ ] G.E.D. Certificate

Colleges or Universities Attended	Course of Study/Major	Degree Awarded
San Diego State University	B.S. Business Administration	■ Yes ☐ No
San Francisco State University	MBA Finance	■ Yes ☐ No
		☐ Yes ☐ No

Other Training Completed:

Board, Committee or Commission Name: Treasury Oversight Committee
Seat Name:

Have you ever attended a meeting of the advisory board for which you are applying?
■ No ☐ Yes If yes, how many? I have read the meeting notes.

Please explain why you would like to serve on this particular board, committee, or commission.

I am retiring from Wells Fargo Asset Management on 10/30/2020 and I believe with my background and experience I can be productive member of this oversight committee. The County Treasury is vital to the community and proper review is necessary given the trust of the taxpayers and the financial importance of funds managed by County Treasurer.This would provide me a way to give back the county I have called home since 1989.

Describe your qualifications for this appointment. (NOTE: you may also include a copy of your resume with this application)

I had experience at Wilshire Associates working with public pension plans. I also had direct experience working with Contra Costa County on investments of tax revenues and the county pool assets in the past with both WFAM and for CalTrust. I am familiar with the state code 53601 outlining appropriate investments for such funds. I currently chair the Finance Committee for FACE and serve on the investment committee for the Oakland Diocese covering Alameda and Contra Costa County.

I am including my resume with this application:
Please check one: ■ Yes ☐ No

I would like to be considered for appointment to other advisory bodies for which I may be qualified.
Please check one: ☐ Yes ■ No

Are you currently or have you ever been appointed to a Contra Costa County advisory board?

Please check one: ☐ Yes ■ No

List any volunteer and community experience, including any boards on which you have served.

- Chair the Finance Committee for FACE (Family Aid Catholic Education).
- Serve on the Investment Committee for the Oakland Diocese.

Do you have a familial relationship with a member of the Board of Supervisors? (Please refer to the relationships listed below or Resolution no. 2011/55)

Please check one: ☐ Yes ■ No

If Yes, please identify the nature of the relationship:

Do you have any financial relationships with the county, such as grants, contracts, or other economic relationships?

Please check one: ☐ Yes ■ No

If Yes, please identify the nature of the relationship:

I CERTIFY that the statements made by me in this application are true, complete, and correct to the best of my knowledge and belief, and are made in good faith. I acknowledge and understand that all information in this application is pub [illegible] ree that misstatements and/or ommissions of material fact may cause forfeiture [illegible] nmittee, or commission in Contra Costa County.

Signed: ______ ______________ **Date:** 10/26/2020

Submit this application to: Clerk of the Board of Supervisors
651 Pine St., Room 106
Martinez, CA 94553

Questions about this application? Contact the Clerk of the Board at (925) 335-1900 or by email at ClerkofTheBoard@cob.cccounty.us

Important Information

1. This application and any attachments you provide to it is a public document and is subject to the California Public Records Act (CA Government Code §6250-6270).

2. All members of appointed bodies are required to take the advisory body training provided by Contra Costa County.

3. Members of certain boards, commissions, and committees may be required to: 1) file a Statement of Economic Interest Form also known as a Form 700, and 2) complete the State Ethics Training Course as required by AB 1234.

4. Meetings may be held in various locations and some locations may not be accessible by public transportation.

5. Meeting dates and times are subject to change and may occur up to two (2) days per month.

6. Some boards, committees, or commissions may assign members to subcommittees or work groups which may require an additional commitment of time.

7. As indicated in Board Resolution 2011/55, a person will not be eligible for appointment if he/she is related to a Board of Supervisors member in any of the following relationships: mother, father, son, daughter, brother, sister, grandmother, grandfather, grandson, granddaughter, great-grandfather, great-grandmother, aunt, uncle, nephew, niece, great-grandson, great-granddaughter, first-cousin, husband, wife, father-in-law, mother-in-law, daughter-in-law, stepson, stepdaughter, sister-in-law, brother-in-law, spouse's grandmother, spouse's grandfather, spouse's granddaughter, and spouses' grandson, registered domestic partner, relatives of a registered domestic partner as listed above.

8. A person will not be eligible to serve if the person shares a financial interest as defined in Government Code §87103 with a Board of Supervisors Member.

LARRY FERNANDES

Walnut Creek, California 94598

SUMMARY

Senior asset management executive with managerial and direct business development and client relationship experience. Motivated by learning and new challenges seeking leadership position including combined sales and service teams targeting a focused client segment. A proven and successful strategic thinker who works through challenges and builds out and executes a plan to achieve success. Hands on leader who works directly with clients and prospects understanding their needs then providing solutions.

PROFESSIONAL EXPERIENCE

WELLS FARGO ASSET MANAGEMENT — **San Francisco, CA**

Executive Vice President, Managing Director — *1987 - ~~Present~~* 10/20

National Sales Manager – Balance Sheet & Insurance Asset Management — *1999 – ~~Present~~*

Manage a 16 member team providing investment solutions for institutional clients in need of balance sheet investment management solutions.

- Expanded and built out the team in line with organizational growth in scale, capabilities and scope
- Added mutual funds and private placement structures in addition to separate account capabilities to meet client demand
- Managed teams, product offerings and business through various interest rate cycles, mergers and acquisitions and various organizational changes
- Expanded cross sell efforts with the Wholesale Bank at Wells Fargo increasing the opportunity set and our success rate

Selected Achievements

- My team has exceeded our sales goal 17 of 20 years and in the years we fell short we always exceeded 90%+ of our stated goal
- Rebranded the team Balance Sheet Asset Management Sales with additional focus beyond short duration
  - Started the insurance asset management sales practice moving us up into a top 12 status
  - Embraced on a long duration goal for the team with added focus on captives, banks & healthcare

Senior Vice President, Client Relationship Management Manager – Liquidity Management Team — *1996 - 1999*

Managed a team of 5 relationship managers focused on providing separate account fixed income solutions for balance sheet asset pools. Managed the team through multiple mergers including First Interstate and Norwest Bank.

Vice President, Relationship Manager – Liquidity Management Team — *1990-1996*

Built and managed 37 client relationships of institutional clients for the Liquidity Management team in partnership with client administration, portfolio management and business development. Maintained and grew my book of business as a top performer.

Assistant Vice President, Portfolio Manager – Wealth Trust Division — *1987-1990*

Managed high net worth trust clients' portfolio asset allocations into diversified trust funds from other unique structures. Implemented operational efficiencies that resulted in better client return results.

WILSHIRE ASSOCIATES — **Santa Monica, CA**

Investment Consulting Group — *1984-1987*

Senior Research Analyst Manager — *1986-1987*

Managed research analyst team of eight supporting the investment consultant group.

Research Analyst — *1984-1986*

Created effective quarterly client meeting reports and worked on special projects for the consultant team.

EDUCATION

San Francisco State University — **San Francisco, CA**

Master of Business Administration - Corporate Finance and Business Management — *1990*

San Diego State University — **San Diego, CA**

Bachelor of Science - Business Administration, Emphasis Finance Minor: Psychology — *1984*

ADDITIONAL

- Chair Finance Committee for Family Aid Catholic Education, Investment Committee Member Oakland Diocese
- FINRA Series 6, 82, 63, 26 and 24 Licensed
- Interests include travel, film, reading, sports and running & exercise