MICHAEL VIDAL

Santa Barbara, CA

OBJECTIVE

To continue serving as a Trustee of the Santa Barbara County Employees' Retirement System (SBCERS), leveraging my extensive professional experience in investments and financial planning to contribute to the fiduciary oversight and long-term success of the pension system.

EXPERIENCE

2022 – Present: Principal, Select Insurance Services / Select Investment Services Founded and lead two independent firms providing comprehensive insurance and investment management services. Deliver client-focused strategies integrating financial planning, portfolio management, and risk mitigation.

10/2012 – 2022: Certified Financial Planner and Managing Partner, Cornerstone Wealth Management Services / Cornerstone Insurance Services, LLC Provided comprehensive financial planning and risk management services for small businesses and families. Successfully built and managed client relationships while overseeing firm operations.

01/2014 – 12/2015: Adjunct Instructor, University of California, Santa Barbara Taught Risk Management and Retirement Planning courses for the Certified Financial Planning Department.

05/2008 – 10/2012: Community Banking District Manager, Wells Fargo Led over 140 team members and managed all community banking operations for the greater Santa Barbara area, including branches in Ojai, Montecito, Santa Barbara, Goleta, Buellton, and Lompoc.

01/2004 – 05/2008: Store Manager, Wells Fargo Managed multiple banking locations from Ventura to Santa Barbara, achieving consistent sales and service performance targets.

VOLUNTEER WORK

01/2017 – Present: Santa Barbara County Employees' Retirement System (SBCERS) Board Member

03/2009 – 2021: Legal Aid Foundation of Santa Barbara Board of Directors; Past Officer and Committee roles including Secretary, Finance, Personnel, Fundraising and Events.

EDUCATION

1998–2003: University of California, Santa Barbara, B.A., Double Major in Business Economics and Sociology

PROFESSIONAL LICENSES

Series 7 & 66, Health and Life Insurance License, Property & Casualty Insurance License, Real Estate Broker License, and CERTIFIED FINANCIAL PLANNER™.