

APPLICATION FOR COUNTY OF SANTA BARBARA BOARD, COMMISSION, OR COMMITTEE

Return to: Clerk, Board of Supervisors
County Administration Building
105 E. Anapamu Street, Room 407
Santa Barbara, CA 93101

DATE RECEIVED
2012 JAN -9 AM 11:12

COUNTY OF SANTA BARBARA
CLERK OF THE BOARD OF SUPERVISORS

Copy to Supervisor

INSTRUCTIONS: Please complete each item below. Be sure to enter the title of the Board, Commission, or Committee (only one per application please) for which you desire consideration. For more complete information or assistance contact the Clerk, Board of Supervisors' Office. This application shall be maintained for a period of one year only. After one year it is necessary to file a new application for another year of eligibility. Please print in Ink or type.

1. APPLYING FOR: (Use specific title)
Retirement Board Member

2. Today's Date:
1-9-2012

3. NAME: **Benedetti Trent J**

Last First Middle

4. E-MAIL ADDRESS:
trent@benedetticpa.com

6. ADDRESS:
2151 S. College DR Ste 101

Number Street

Santa Maria, CA 93455

City Zip Code

5. TELEPHONE:
Home: **805-937-9625**
Business: **805-922-4881**

7. References: Give names and addresses of three persons, not relatives, who have knowledge of your character, experience, community involvement, and abilities.

NAME	ADDRESS	TELEPHONE NUMBER	OCCUPATION
A. Harry Hagen	105 E Anapamu St Santa Barbara CA 93101	805-568-2490	Treasurer - Tax Collector
B. Steve Lavagnino	908 Fred St. Santa Barbara CA 93101	805-264-1109	5th District Supervisor
C. Jon Gray	511 E. Lakeside Dr #47 Santa Barbara CA 93101	805-346-8467	4th District Supervisor

8. Are you or have you been employed by the County of Santa Barbara? YES No If YES, list: **Non-Payroll position**

Department: **President SB CPA Finance Corporation** Title: **President** Date: _____

9. Please check appropriate boxes (optional):

Ethnic or racial identity:
 White
 Black (African American)
 Hispanic
 Asian/Pacific Islander
 Native American/Alaskan Native
 Other (Please specify)

Sex:
 Male
 Female

10. Education completed:
Bachelor of Science - Accounting

11. Indicate Supervisor who will receive a copy of this application:
Steve Lavagnino

12. EXPERIENCE: Please explain why you are interested in serving and what experience you bring to the Commission or Committee for which you are applying.

I have been self-employed since 1982 as a CPA, CFP and Investment Advisor. Since January 2000 I have served on the SB CPA Finance Corporation Board - my balance of professional & volunteer experience will bring insight to the Retirement Board.

13. ADDITIONAL INFORMATION: Give any information explaining your qualifications, experience, training, education, volunteer activities, community organization memberships, or personal interests that bear on your application for above Board, Commission, or Committee. Attach additional sheets as necessary.

In addition to my accounting degree, I hold professional licenses as a Certified Public Accountant, Certified Financial Planner and Registered Investment Advisor. I successfully completed NASD Securities Licenses Series 6, 7, 24, 53 & 65. My career passion is in education of clients toward a successful retirement. I actively manage small company pensions & look forward to bringing my expertise to the Retirement Board.

14. SIGNATURE OF APPLICANT
1-9-2012 x **Trent Benedetti**

APPLICATION
FOR
COUNTY OF SANTA BARBARA BOARD,
COMMISSION, OR COMMITTEE

Return to: Clerk, Board of Supervisors
County Administration Building
105 E. Anapamu Street, Room 407
Santa Barbara, CA 93101

DATE RECEIVED

2012 JAN -3 PM 2:44
 Copy to Supervisor

INSTRUCTIONS: Please complete each item below. Be sure to enter the title of the Board, Commission, or Committee (only one per application please) for which you desire consideration. For more complete information or assistance, contact the Clerk, Board of Supervisors' Office. This application shall be maintained for a period of one year only. After one year it is necessary to file a new application for another year of eligibility. **Please print in ink or type.**

1. APPLYING FOR: (Use specific title) Board Member /Trustee, Santa Barbara County Employees' Retirement System
2. Today's Date: Dec 17, 2011

3. NAME: KRAINES Robert Guy
Last First Middle
4. E-MAIL ADDRESS: guykraines@gmail.com

6. ADDRESS: 667 Del Parque Dr., Unit D
Number Street
Santa Barbara CA 93103
City Zip Code
5. TELEPHONE:
Home: 650-823-2568
Business: _____

7. References: Give names and addresses of three persons, not relatives, who have knowledge of your character, experience, commu-
These three references worked with me during the period I directed a 20,000 participant defined benefit plan as Treasurer of CNF Transportation. (1) Benedict Bowler is currently a Trustee of SamCERA and chair of their investment committee. He worked with me on a variety of Treasury activities; (2) Sara Hart is currently Director, Enterprise Benefits for Con-Way. She was a member of the CNF Benefits Administration Committee who did not have a financial background; and (3) Patrick Thomas is currently a Vice President at Strategic Investment Solutions. He was a lead member of our pension consultant team at the time. All three can speak to my technical skill and my ability to manage a Board with diverse backgrounds. Further contact information is attached.

8. Are you or have you been employed by the County of Santa Barbara? YES No If YES, list:
Department: _____ Title: _____ Date: _____

9. Please check appropriate boxes (optional):
Ethnic or racial identity:
 White
 Black (African American)
 Hispanic
 Asian/Pacific Islander
 Native American/Alaskan Native
 Other (Please specify)
Sex:
 Male
 Female

10. Education completed:
B.A. Mathematics U.C. Berkeley, Phi Beta Kappa
M.S. Statistics, M.S. Operations Research, Stanford
11. Indicate Supervisor who will receive a copy of this application:
Janet Wolf

12. EXPERIENCE.

As Treasurer of CNF Transportation, a \$6 billion trucking and airfreight company, I managed a \$435m defined benefit pension plan from 1995 to 2000. During the full five years I managed the fund, we performed at the 11th percentile of comparable plans, and for the final 3 years, the 6th percentile. We had a strong and diverse Pension/Benefits Board that was integral to achieving those results.

More generally, I have a broad-based financial background, with over 25 years of corporate finance and capital markets experience. While my most recognizable role was as VP-Treasurer of Genentech, the world's oldest biotechnology company, I have substantial local experience as well. From 2004 until I retired at the end of 2010, I was President and COO of Santa Barbara-based Sabrient Systems. Sabrient is known both as a leader in investment research and as the index provider for several actively managed exchange-traded funds (ETFs). Their largest fund is rated four stars by Morningstar, and their other US-traded fund is rated five stars.

There are several reasons I am interested in joining the SBCERS Board. First, I have always enjoyed working in the pension field, and appreciated the individuals, both financial and non-financial, drawn to it. Second, as a Santa Barbara county taxpayer, I have a tangible stake in the fund's performance. Third, I think I can make a difference, working with other Board members, in assuring that the positive trends in the fund's relative performance continue.

13. ADDITIONAL INFORMATION

Please see the attached resume.

14. SIGNATURE OF APPLICANT

R. Guy Kraines 12/17/2011

667 Del Parque Dr., Unit D
Santa Barbara, Ca 93103

R. GUY KRAINES
Career Overview

650-823-2568, 805-966-6185
GuyKraines@gmail.com

SABRIENT SYSTEMS, LLC (2004 – 2010)

Recruited as **President and COO**, responsible for general management for this growing equity research company that tripled in size during my tenure. Also active in product design and marketing.

- Sabrient's fundamentals-based quantitative research is accepted in both retail-oriented and institutional marketplaces.
- Institutionally, Sabrient is the index provider for several actively-managed exchange-traded funds with assets totaling over \$210m as of December 2011. The two U.S. funds are rated 4-star and 5-star by Morningstar. The company also provides various customized stock ranking products to a number of large and small hedge funds.
- Retail-oriented products include standardized 4-page reports on 5,800 companies and 320 ETFs. They are largely distributed via major broker-dealers to their on-line customers. Fidelity is the largest single customer.

GENENTECH, INC. (2000 - 2003)

Recruited as **Vice President - Finance**, responsible for Treasury, Tax, Insurance, Real Estate and Purchasing activities. In 2001, became **Vice President - Corporate Information Technology**, responsible for a staff of 250 and a budget of over \$60m.

- Implemented hedging program for an \$800m biotech equity portfolio obtained through collaborations, navigating difficult legal/regulatory issues. Mitigated over 70% of losses on hedged stocks in the 2000/2001 market crash. Also managed \$1.3b fixed income portfolio to above-benchmark returns.
- Obtained targeted investment ratings for Genentech, matching those of industry leader Amgen despite Genentech's smaller revenue base, lower earnings and much weaker cash flows. Built \$500m bank group for innovative financing of manufacturing capacity.
- Drove significant improvements in systems reliability. Initiated 24x7 operations, supported by the company's first comprehensive systems and network monitoring tool. Implemented first portal solutions.
- Merged the two largest IT organizations. Merger made possible by increased respect for central IT services.

CNF TRANSPORTATION (1994 - 2000)

Recruited as **Assistant Treasurer**, promoted to **Vice President and Treasurer** in 1996 upon the successful spin-out of the company's slow growth businesses. Responsible for all Treasury, Tax, Insurance and Pension activities of the company.

- Directed a \$435 million defined benefit retirement plan serving over 20,000 active and retired participants. Among comparable sized corporate plans, fund performance was 6th percentile or better for 1, 2, and 3-year periods, and 11th percentile for 5 years. Responsibilities included fund management, plan compliance, setting plan meeting agendas, and financial vetting of human resource's proposals for plan modifications.
- Completed over \$1.5 billion in financings over a 5-year span, tapping equity, public debt, municipal debt, bank and lease marketplaces, funding \$2.5b in new business growth.
- Maintained and improved relationships with Moody's and S&P by providing understandable models of revenue, margin, and balance sheet drivers.
- Designed / executed financial underpinnings of the spin-off of a \$2b revenue company; managed inter-company financial relationship during transition; ran the "road show" equity re-launch of remaining firm.

AMDAHL CORPORATION (1981 - 1994)

As **Assistant Treasurer** (1990 - 1994) responsibilities included interest rate and currency hedging, managing fixed income investments and management of foreign company capital structures. Earlier, progressed through field operations and planning positions. Directed the company's long range planning activities.

- Developed the third-party leasing market for Amdahl, more than doubling the lease funding available for their computers and facilitating their aggressive growth. Front-line sales/finance role in customer sites.
- Outperformed benchmark by \$6M in managing a \$250 million yen hedge portfolio for Amdahl, whose FX exposure exceeded 70% of revenues. Directed over \$1B in FX annually. Strong interest rate management experience.

ACADEMIC BACKGROUND (1974 - 1981)

- **Stanford University:** M.S., Statistics/Operations Research, National Institute of Health Fellow
- **Stanford Medical School:** As a biostatistician, contributed to applications of database and artificial intelligence techniques to medicine.
- **U.C. Berkeley:** B.A., Mathematics, Phi Beta Kappa. Won graduating prize as top senior in Math.

R. Guy Kraines, SBCERS Board Applicant

References

December 2011

These three references worked with me during the period I directed a 20,000 participant, \$435m defined benefit plan as Treasurer of CNF Transportation.

Benedict Bowler is currently a Trustee of SamCERA and chair of their investment committee. He worked with me on a variety of Treasury activities.

650-303-3244
bbowler3@comcast.net
1927 Birch Ave
San Carlos CA 94070

Sara Hart is currently Director, Enterprise Benefits for Con-Way. She was a member of the CNF Benefits Administration Committee who did not have a financial background.

503-450-4102
Hart.Sara@con-way.com
1717 NW 21st Ave
Portland, OR 97209

Patrick Thomas is currently a Vice President at Strategic Investment Solutions. He was a lead member of our pension consultant team at the time.

(415) 362-3484
333 Bush St., Ste. 2000
San Francisco, CA 94104

All three can speak to my technical skill and my ability to communicate with and manage a Board with diverse backgrounds.

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1. APPLYING FOR: (Use specific title) Board of Retirement for SB County Employees' Retirement System	2. Today's Date: 28 Nov 2011
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3. NAME: Garner Susan <small>Last First Middle</small>	4. E-MAIL ADDRESS: suzan.garner@gmail.com
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6. ADDRESS: 930 Alston Road <small>Number Street</small> Santa Barbara CA 93108 <small>City Zip Code</small>	5. TELEPHONE: Home: 805-969-1754 Cell/Business: 805-455-8420
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7. References: Give names and addresses of three persons, not relatives, who have knowledge of your character, experience, community involvement, and abilities.

NAME	ADDRESS	TELEPHONE NUMBER	OCCUPATION
A. Cass Ensburg	828 Tornoe Rd SB, CA 93105	455-8332	architect
B. Whitney Fingersall	575 Hot Springs Rd SB, CA 93108	488-0001	SB Middle School administrator
C. Beth Schneider	4187 Santa Margarita way Coletz, CA 93117	448-5046	UCSB Professor + President of SBWPC (SB Women's Political Committee)

8. Are you or have you been employed by the County of Santa Barbara? YES No If YES, list:
 Department: _____ Title: _____ Date: _____

9. Please check appropriate boxes (optional): Ethnic or racial identity: <input checked="" type="checkbox"/> White <input type="checkbox"/> Black (African American) <input type="checkbox"/> Hispanic <input type="checkbox"/> Asian/Pacific Islander <input type="checkbox"/> Native American/Alaskan Native <input type="checkbox"/> Other (Please specify) Sex: <input type="checkbox"/> Male <input checked="" type="checkbox"/> Female	10. Education completed: masters - MBA
	11. Indicate Supervisor who will receive a copy of this application: Janet Wolf

12. EXPERIENCE: Please explain why you are interested in serving and what experience you bring to the Commission or Committee for which you are applying.
see attached sheet

13. ADDITIONAL INFORMATION: Give any information explaining your qualifications, experience, training, education, volunteer activities, community organization memberships, or personal interests that bear on your application for above Board, Commission, or Committee. Attach additional sheets as necessary.
see attached sheet

14. SIGNATURE OF APPLICANT


November 28, 2011

SUPPLEMENTAL INFORMATION
FOR THE APPLICATION TO SERVE ON
THE BOARD OF RETIREMENT
SANTA BARBARA COUNTY EMPLOYEES' RETIREMENT SYSTEM

QUALIFICATIONS & EXPERIENCE:

Suzan Garner is co-owner, Director & VP of Business Development of Stonemark Construction Management, a full-service consulting firm with offices in Santa Barbara & Los Angeles. Stonemark manages the planning and construction of major projects including custom homes & residential estates, commercial buildings, sacred spaces & nonprofit facilities, and homeowner associations. Suzan is a member of the Board of Directors of the Santa Barbara Women's Political Committee and currently serves on its Fund Development & Media committees. She also serves as Director & President/CEO of Siddhartha Foundation International (SFI), a nonprofit organization with plans to establish a contemplative center on the Central Coast to create positive change in ourselves, our communities and the environment. In 1984, Suzan co-founded Clonetics Corporation, a privately-held biotechnology company that develops, manufactures and markets living human cell systems worldwide for industry, government and academic research & testing purposes. She served as Director & President/CEO of Clonetics until it was acquired in 1996 by BioWhittaker Inc, a publicly-held biotechnology company. Suzan moved to Santa Barbara with her husband and two sons in 1997. She received a MBA from UCLA's Anderson School of Management.

WHY I AM INTERESTED IN SERVING:

For the past ten years I have actively managed the regular, education and retirement investment accounts for my family. I have a passionate interest in the investment field and became equally passionate about political action for the first time in my life when I learned the causes of the 2008 financial crisis – years of irresponsible financial industry deregulation and out-of-control greed.

Suzan Garner
930 Alston Road
Santa Barbara, CA 93108
805-455-8420
suzangarner@gmail.com

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2011 DEC 22 PM 1:44
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1. APPLYING FOR: (Use specific title)
Santa Barbara County Retirement Board

2. Today's Date:
11.12.22

3. NAME: *Ziegler Jonathan Holland*

4. E-MAIL ADDRESS:
j405@verizon.net

Last First Middle

6. ADDRESS:
PO Box 40322

5. TELEPHONE:
Home: *805 560 8989*
Business: *805 560 8989*

Number Street City Zip Code

7. References: Give names and addresses of three persons, not relatives, who have knowledge of your character, experience, community involvement, and abilities.

NAME	ADDRESS	TELEPHONE NUMBER	OCCUPATION
A. <i>Ted Sten</i>	<i>411 East Canon Perdido</i>	<i>805 568 2291</i>	<i>Foreman SPLGT</i>
B. <i>Tom Morse</i>	<i>POB 30806 Santa Barbara 93130</i>	<i>805 495 2790</i>	
C. <i>Ken Fitzpatrick</i>		<i>805 698 5521</i>	<i>Financial Advisor</i>

8. Are you or have you been employed by the County of Santa Barbara? YES No If YES, list:
Department: _____ Title: _____ Date: _____

9. Please check appropriate boxes (optional):

Ethnic or racial identity:
 White
 Black (African American)
 Hispanic
 Asian/Pacific Islander
 Native American/Alaskan Native
 Other (Please specify)

Sex:
 Male
 Female

10. Education completed:
MBA : BS ECONOMICS

11. Indicate Supervisor who will receive a copy of this application:
Janet Wolf

12. EXPERIENCE: Please explain why you are interested in serving and what experience you bring to the Commission or Committee for which you are applying.
see attached

13. ADDITIONAL INFORMATION: Give any information explaining your qualifications, experience, training, education, volunteer activities, community organization memberships, or personal interests that bear on your application for above Board, Commission, or Committee. Attach additional sheets as necessary.
see attached

14. SIGNATURE OF APPLICANT
[Signature]

12. **EXPERIENCE:** The powerful combination of my a) three-years on the Santa Barbara County Grand Jury and b) rewarding career as a securities analyst on Wall Street [figuratively speaking] present a wonderful opportunity to extrapolate my interests in both the county [and its issues] and financial analysis to this opening. Experience includes Deutsche Bank Securities, Inc; Salomon Brothers [Salomon Smith Barney]; Sutro & Co, Incorporated; and Merrill Lynch as a securities analyst covering a variety of companies and industries, mostly in the consumer sector. No experience with derivatives.

13. **ADDITIONAL INFORMATION:** I bring an important civic interest as supported by my role on three County grand juries. My education includes a BS in Economics from the Wharton School of Finance and Commerce followed by a MBA in Finance from Harvard Graduate School of Business Administration.

An extremely alive, challenging, and rewarding career at four important securities firms provided the opportunity to exercise my analytical skill-set. The responsibilities included visits to company facilities and interviews of company management and industry leaders. Not to be ignored was in-the-field-research. At the core, financial modeling and projections in Excel to be included in published research reports were important elements of the profession [n.b. both mathematical and writing skills were required for a successful career].

In addition, I spent significant time on-the-road [close to two million air miles to show for it] meeting with institutional investors. Public speaking also provided the opportunity to address more sizable audiences. In the mid-nineties, I was voted as a member of the Institutional Investor magazine All America Research Team. I was awarded my CFA certificate [Chartered Financial Analyst] in 1975